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ABSTRACT

This handbook, a companion to "Standards for Professional Development Schools," describes an assessment process for Professional Development School (PDS) participants, specifically for PDS standards, developed during 3 years of a field test. The assessment process is intended to support the continued development of PDS partnerships and assure quality and accountability. The handbook offers step-by-step guidance to PDS partnerships wishing to carry out self-studies. The process involves a self-study and a site visit. Part 1 of the handbook, "Self Study," discusses purposes of self-study, suggestions for conducting self-study, and multiple school partnership involved in self-study. Part 2, "The Visit," discusses conduct of a PDS partnership visit, preparing for and conducting the visit, and visits in multiple school partnerships. Each part provides instructions for preparing for and implementing the process, suggested timelines and schedules, a template for constructing reports, and questions helpful in guiding the process. Five appendixes include field test participants, developmental guidelines and matrices for self-study review, guiding questions for self-studies and visit team members, templates for self-study reports and visit reports, and a schematic of a PDS site visit schedule. (SM)

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HANDBOOK FOR THE ASSESSMENT OF PROFESSIONAL DEVELOPMENT SCHOOLS

NATIONAL COUNCIL FOR ACCREDITATION OF TEACHER EDUCATION

Spring 2001

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TABLE OF CONTENTS

Acknowledgments i

Introduction iii

Part I: Self Study 1

Purpose of the Self-Study 3
- Benefits from Conducting a Self-Study 3
- Self-Study Follow-Up Plans 3
- Questions Framing the Self-Study 4

Suggestions for Conducting the Self-Study 5
- Clarify the Unit of Study 5
- Establish a Representative Partnership Steering Committee (PSC) 5
- Describe and Define the Nature of the PDS Work to be Considered 6
- Conduct the Inquiry Process: Evidence and Sources of Evidence 7
- Assess Partnership Accomplishments: Formulate Conclusions, Statement of Standing, and Recommendations 8
- Share and Finalize the Self-Study Report 11
- Implement the Follow-Up 11

Multiple School Partnerships: Self-Studies 13
- Definition of a Multiple School PDS Partnership 13
- Purposes for MSPDS Partnership Self-Assessment 13
- How Does a Multiple School PDS Partnership Self Assessment Differ from a Single Site Self-Study? 13
- Steps in Conducting a MSPDS Partnership Self-Study 14

Part II: The Visit 17

Conduct of a PDS Partnership Visit 19
- Purpose of a PDS Partnership Visit 19
- Questions Framing the Visit Process 19

Suggestions for Preparing for and Conducting the Visit 20
- Code of Conduct for the Visit Team 21
- Roles for Participants, Before, During, and After the Visit 21
- Early Planning for a Visit 22
- Guidelines and Schedule for Preparing for a Visit 23
- The Visit Team: Composition, Roles, and Stance 27
- The Inquiry Process: Examination of Evidence and Source of Evidence 29
- The Stance 30

The Assessment Process: Formulation of Conclusions,
Statements of Standing and Recommendations 31
Guidelines and Schedule for Visit Activities 35
Implementing the Follow-Up 41

Multiple School Partnerships: Visits 42
Statements of Standing 42
Locus of Activity 42
Steps in Conducting a Multiple School Partnership Visit 42
Questions Framing a Visit 45
Implementing the Follow-Up 45

Appendix A: Field Test Participants 47

Appendix B: Developmental Guidelines and Matrices for Self-Study Review 53

Appendix C: Guiding Questions For Self-Studies and Visit Team Members 81

Appendix D: Templates for Self-Study Reports and Visit Reports 87

Appendix E: Schematic of PDS Site Visit Schedule 99

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Most important, however, are the hundreds of individuals who field tested the process through their participation in the twenty pilot sites, and as members of visiting teams. These PDS participants conducted self-studies, attended visitor training, hosted visiting teams, and were team members themselves. Their experiences shaped the assessment process and the contents of this *Handbook*.

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Marsha Levine
Project Director
Spring 2001

IN MEMORY

OF

ELEANOR J. CHURINS

(1947–2001)

INTRODUCTION

This *Handbook* is a companion to *Standards for Professional Development Schools*. It describes an assessment process developed by PDS participants, specifically for the PDS Standards, during the three years of the field test. There are two parts to the process: a self-study and a site visit.

Uses

The assessment process is intended to support the continued development of PDS partnerships, and to assure quality and accountability. In order to support PDS development, the assessment process honors the characteristics and culture of PDS partnerships. As a result of engaging in the assessment process, the partnership increases its ability to move forward in directions that strengthen its work. Participation, therefore, is in the interest of the partnership.

Equally important, the assessment process is a tool for accountability and quality assurance in PDS partnerships. The process results in thoughtful, substantive conclusions about how the work of the partnership currently meets the Standards.

The Design and Development of the Assessment Process

A Project Design Team created the initial process. The Design Team members represented PDS constituencies including university and school partners and the broader PDS community. Most were drawn from among the PDS pilot sites. Their goal was to design an assessment process that (1) mirrored what was important in the Standards and (2) could be used by PDS partnerships and visiting teams for the above stated purposes.

Twenty diverse PDS partnerships participated in the field test. Field-test sites included public and private higher education institutions; large and small professional preparation programs; four year, five year, and fifth year programs; urban, suburban, and rural school districts; elementary, middle, and secondary schools; and partnerships involving a single university and one school site; and partnerships involving many school sites. Some field-test sites had several years of experience in working together; others were at the beginning stages of development. Some university partners had all of their candidates in PDS settings; for others the PDS partnership represented a fraction of their clinical program. Working with this kind of diversity allowed the project to examine the relevance of the Standards in the real world of PDSs, and to learn about how PDS partnerships with these diverse circumstances might be assessed.

Each partnership engaged in a self-study process, and sixteen hosted a site visit. Trained teams of PDS colleagues participated in four-day visits to these pilot sites. They developed site reports for each visit. In the course of the field-test, staff conducted focus groups and structured interviews, surveyed site participants, and analyzed self-studies and visit team reports. This intensive process resulted in revisions of both the Standards and the assessment process.

Features of the Assessment Process

The *Handbook* addresses the two key components of the PDS assessment process:

- The Partnership Self-Study
- The Visit

In order to assure coherence within each part of the process and between the parts, the design allows the self-study, the visit, and the partnership follow-up activities to build upon each other and inform each other. The method for looking at PDS work generating conclusions, statements of standing, and recommendations is the same in the self-study and visit.

The assessment process is designed so that PDS partnerships may choose to engage only in the self-study. As a free-standing assessment process, the self-study engages PDS partners in intense inquiry focused on looking at their work through the lens of the PDS Standards. PDS partnerships at all stages of development, including those at the beginning stage, can benefit from this part of the process.

Some PDS partnerships will elect to follow their self-study with a visit. Partnerships at earlier stages of development are discouraged from pursuing a visit. It is difficult for such partnerships to organize for and support a visit; and they are less likely to benefit as much as their colleagues who are more developed as partnerships. Others may simply not choose to elect to have a visit.

All PDS partnerships engaging in either the self-study or self-study and visit should pursue follow-up initiatives.

Self-Study: Participants and Process

The self-study, like the visit, is a collegial activity. It depends upon the work of a balanced, representative group of PDS participants. Organizing to conduct a self-study is a critical part of the process. PDS partnerships undertaking the self-study process need to form a working group, called a Partnership Steering Committee (PSC). PSC membership includes PDS partners, candidates, families and community members, administrators of the schools and universities, representatives of teachers unions or professional associations, and P-12 students when appropriate. Members of the PSC are charged with carrying out the inquiry process. They will examine the work of the PDS partnership, gathering evidence which will allow them to collectively draw conclusions about how their partnership reflects the elements of each standard. After drawing their conclusions they will collectively decide on where their PDS partnership stands with respect to development for each standard. The PDS Standards and developmental guidelines will be their touchstone for this process.

Visit: Participants and Process

Visiting team members should include representatives of PDS principal partners (i.e., school and university faculty with PDS experience). Additionally, PDS administrators (higher education and P-12), union or association representatives, and other members of the PDS partnership constituency should be included on visiting teams. Team membership should reflect the diversity present in the partnership being visited. School faculty on visiting teams should have experience at the relevant school levels.

The visiting team uses an inquiry process very similar to that used in the self-study process. The *Handbook* describes this process in detail.

How the Standards and Assessment Process Are Connected

The PDS Standards and the processes for using them are closely connected. The assessment processes mirror the Standards in the following ways:

- PDSs are **both developing** and **developmental**. Therefore, the Standards stress the developmental nature of their mission, and the assessment process focuses on stages of development.
- **PDS work** is central to both the Standards and the assessment process. The Standards are about characteristics necessary to support PDS work. The self–study and visit are designed with PDS work as the focus and the entry point for the assessment. The process seeks to achieve as full an understanding of the partnership's work as possible, including its accomplishments and outcomes.
- **Accountability and quality assurance** are critical characteristics of PDSs. The Standards address these directly. The assessment process is designed to focus on how the PDS partnership fulfills its responsibility as a Standards-bearing institution.
- **Collaboration** is a critical characteristic of PDSs. There is a standard for collaboration. The assessment process assumes collaboration. In order to carry out a self-study, members of the PDS partnership must work intensively with one another. Team membership must reflect all the partners in a PDS, and they are required to work together and reach consensus.
- **Inquiry**, often the function to get least attention, is the process through which professional and student learning are integrated. PDS partners and candidates engage in inquiry to identify and meet students' learning needs; to effect candidate learning; and to determine their professional development agenda. This concept permeates the Standards. The partnership and visitors must engage in an inquiry process as they assess the partnership. The assessment process focuses attention on "what matters most" to all teaching and learning organizations, that is, the effective teaching and learning of its participants.

Using the *Handbook*

The assessment process described within this *Handbook* is not presently an accreditation process, but rather a collegial assessment process that includes a partnership self-study. The *Handbook* was written to provide practical, step-by-step guidance to PDS partnerships wishing to carry out self-studies, and for NCATE and/or other organizations, agencies, or networks that might serve as sponsors or organizers for site visits. Each part provides instructions for preparing for, and implementing the process; suggested timelines and schedules; a template for constructing reports; and questions helpful in guiding the process.

PART I:
SELF-STUDY

PURPOSE OF THE SELF-STUDY

Conducting a self-study is a powerful process for assessing and improving a professional development school partnership. It asks a partnership to look carefully at itself, to focus on the actual PDS work that it is doing, and to collectively form conclusions about how well the partnership is functioning in relation to the PDS Standards.

Benefits From Conducting a Self-Study

The partnership's conclusions and its selection of evidence to support those conclusions are powerful because they come from within the partnership, not from an external set of rules or judgments. At the same time, the self-study is tightly tied to the PDS Standards, a nationally recognized set of expectations of PDS partnerships. The self-study and planned follow-up processes allow partnerships to use this externally recognized framework to reflect on their own development as PDSs and to share that assessment with local stakeholders.

In addition to providing a focused, standards-based opportunity for self development and reflection, the self-study process described in this *Handbook* supports and models the development of one of the key characteristics that successful PDS partnerships share: the ability to use inquiry to assess and drive PDS practice.

Conducting a self-study is a collaborative process that promotes sturdier connections among institutional and individual partners. When done as suggested in this *Handbook,* the self-study reinforces and models another key characteristic of successful PDSs: that the responsibility for conducting PDS work is shared by an extended learning community, including families, districts, arts and sciences faculty, as well as school and professional education faculty. The self-study process strengthens collaborations by drawing on a wide range of stakeholders. It raises stakeholder leadership awareness and buy-in and helps everyone see how PDS efforts fit in with, and support, other institutional priorities. By collecting and examining a variety of accountability data, the self-study process demonstrates to inside and outside stakeholders how well the PDS is meeting candidate and external standards.

The self-study process also helps keep the partnership focused on what matters in professional development schools — the improvement of learning for P–12 students. Because the *Handbook* is closely linked to the Standards, which keep P-12 students at the center of PDS work, partnerships conducting a self-study will find themselves continually coming back to this important focus.

Self-Study Follow-up Plans

Partnerships with carefully planned follow-up activities reap even more benefits from a self-study. Producing a document that assesses where a partnership is in its development as a PDS helps a partnership grow if the document is used well. Partnerships may decide to use the self-study by:

- Bringing the self-study document back to an all-PDS annual retreat and using it to inform next steps of the overall partnership, or the work of its subcommittees
- Using the lessons of the self-study to guide the hiring and use of consultants, or other efforts to improve the partnership in ways that are suggested by the recommendations of the study
- Sharing the self-study within a PDS network, or with a set of "critical friends," or cooperating PDSs in ways that help the partnership move forward with its objectives

- Using the self-study as a basis for arranging a visit from a team of PDS educators experienced in working with the PDS Standards, and trained in conducting a visit. The visit provides external validation and feedback to the partnership and can make important contributions to its continuing development and other follow-up efforts. The self-study document will help orient visit team members to the site, focus them on areas of importance to the partnership, and help them share common language concerning the PDS Standards and the work of the partnership.

Questions Framing the Self-Study

Partnerships considering conducting a self-study begin with the careful examination and understanding of the PDS Standards. The Standards, and the goals for professional development schools that they represent, provide the lens through which the partnership can look at its work and its development. These five question clusters provide a foundation for the self-study:

1. What is the work of the partnership? How do inquiry and a focus on learning outcomes drive that work?
2. How well does the partnership's PDS work simultaneously focus on meeting P–12 students' needs and support the learning of faculty and candidates?
3. How well is each of the five PDS Standards represented in the work and in the partnership? Using the developmental guidelines, at which stage of development for each standard does the partnership see itself? What evidence supports this?
4. How well are the key concepts embedded in the Standards represented in the partnership and its work? These concepts are listed below and are described in detail in the introduction to *Standards for Professional Development Schools.*

   Time before the beginning

   Integration of professional and student learning through inquiry

   Placing students at the center of PDS work

   Learning in the context of practice

   Boundary spanning

   Blending resources

   Principal partners and institutional partners

   Expanded learning community

   PDS as a standards-bearing institution

   Leveraging change
5. What is the purpose of the partnership in conducting a self-study and possibly planning for a visit? What specific questions is the partnership hoping to answer? How do they tie into the partnership's development as a PDS, the nature of the work it is engaged in, and its sense of its standing on the Standards?

A thoughtful discussion of these questions combined with a close study of the PDS Standards, form the basis

for the decision of a partnership to go forward and conduct a self-study.

The following sections provide information and suggestions for conducting a self-study, including a set of suggestions for procedures. A template for writing a self-study report is included in Appendix D.

SUGGESTIONS FOR CONDUCTING THE SELF-STUDY

The following steps provide a process that reinforces the collaborative, inquiry-driven characteristics so important to PDSs. Each of them is elaborated in the section that follows.

1. Clarify the unit of study
2. Establish a representative Partnership Steering Committee
3. Describe and define the nature of the PDS work to be considered
4. Conduct the inquiry process: examine artifacts and examples of the work
5. Assess partnership accomplishments: formulate conclusions, statements of standing, and recommendations
6. Share and finalize the self-study report
7. Implement the follow-up

At the end of the discussion of the self-study process for a single-site PDS, there is a section that provides modifications and suggestions for multiple school partnerships.

Appendix D contains templates for self-study reports for PDS partnerships involving a single school and for multiple school PDS partnerships.

Clarify the Unit of Study

Partnerships come in all sizes and shapes. Some are collaborations between one school and one college or university, sometimes with one or more additional partners—teachers unions or professional associations, community or cultural groups. Others are more complex, often involving multiple schools spanning grades P–12 and higher education and sometimes including an array of community and other partners.

One of the first issues facing a partnership contemplating doing a self-study is determining the unit of study:

1. If the partnership involves only one PDS, the self-study focuses on the PDS in partnership with the university and the supporting partners. The single site self-study procedure and template is used.
2. If a partnership involves more than a single PDS site, each school does an individual self-study (with its university partner) using the single school self-study template. This is followed by a "meta" self-study that looks across the multiple site partnership using the individual self-studies as the basis for the review. Suggestions for this multiple school self-study are provided at the end of Part I.

Establish a Representative Partnership Steering Committee (PSC)

A self-study takes a great deal of work, and, because it can only be done collectively, it also requires a

considerable amount of coordination among all the partners. A partnership will usually set up a Partnership Steering Committee (PSC) to oversee the completion of the self-study and to help plan and implement follow-up. This is done in a variety of ways, depending on the partnership's current organizational structure and its goals for what that structure might become.

If a partnership already has a work group whose functions are program assessment, strategic planning, or PDS development, it may make sense to expand that group's membership and functions to take on the coordination of the self-study. Some partnerships may prefer to set up a new group as the PSC, and to figure out how the PSC's responsibilities and tasks will dovetail with, and support, the tasks and responsibilities of other existing groups.

In either case, PSC members are a broad, and carefully balanced, representation of the partnership, including candidates, families and community members, P–12 students (where appropriate), as well as staff and administrators of the schools, universities, teachers unions or professional associations and other partnering institutions. The size of this PSC is based on assuring a representative group. To accomplish work as a whole, however, a manageable group should not exceed 12 participants. If it is important to include more individuals, it is likely that working groups will need to be established to carry out various responsibilities.

The Partnership Steering Committee coordinates the inquiry process to ensure that each part of the self-study gets completed in as inclusive a manner as possible. The PSC helps partnership participants, constituencies, and other stakeholders understand the nature of the self-study and assessment process and encourages them to provide formal and informal feedback on the process. The PSC engages the leadership in each of the participating institutions in the work of the self-study and strives to integrate its work into their long-range strategic plans.

The PSC coordinates all aspects of the work of the partnership related to the assessment process described below, and summarized in Table 1 (page 12).

Describe and Define the Nature of the PDS Work to be Considered

The Partnership Steering Committee helps the partnership describe and define what is at the heart of the self-study: the work of the PDS partnership. The PSC initially brainstorms what the group understands to be the key elements of the work, using the four functions of a PDS — teacher preparation, student learning, staff development, and inquiry to improve professional practice — as an organizing guide. The PSC selects work that, in the best case, integrates all four functions and represents important initiatives that they consider to be PDS work. Examples of PDS work that partnerships focus on include:

1. concerted and systematic efforts to reduce the achievement gap among P–12 students of various groups
2. collaborative initiatives to improve continuity of instruction across learning environments directed at improving students' reading skills
3. collaborative research initiatives to create a "new and improved" reading program offered in a bilingual literacy program
4. professional development programs to support continuous development of a P–16 community of learners through a systemic approach that combines candidate preparation and professional growth

for both university and school faculty

5. Restructuring efforts for pre-service education leading to collaboration among special education, general education, and related services faculty at the university and school site in offering and delivering integrated course work and field experience/clinical experiences for candidates

6. Implementing the study of university and school partnership to examine multiple features such as:

   a) initial entry of a cohort in a partner school

   b) observation skills of a new cohort

   c) collaboration among partners

   d) quality settings for the placement of teacher candidates

   e) site coordinators and site professor roles in the partner school setting.

An initiative is PDS work if it is undertaken jointly by PDS partners and candidates and it simultaneously focuses on meeting P–12 students' needs and supporting the learning of faculty and candidates. Such work is characterized by collaboration, inquiry, accountability, and learning in the context of practice.

Conduct the Inquiry Process: Evidence and Sources of Evidence

The PSC begins the self-study inquiry process by gathering descriptions and artifacts relating to one or more strands of PDS work, which serve as the entry point and initial focus of the self-study. These might include inquiry reports, meeting minutes, collections of outcome data for P–12 students, etc. From these and other sources, the PSC will draw evidence about various aspects of the partnership. Meeting minutes can serve as a source for a variety of types of evidence, for example:

- the existence of a complete set of partnership meeting minutes is evidence of a basic level of organization and collaboration.

- records of attendance provide evidence of the governance structure and participants in the partnership. Changes in attendance patterns can suggest increases and decreases in levels of commitment and engagement of various stakeholders over time.

- contents or topics of discussion can give insight into developmental stages (e.g., a focus on basic organizational issues in earlier stages, more on higher levels of inquiry later on).

After examining initial evidence from various data sources, and developing tentative conclusions, the PSC establishes a plan that gathers further evidence and continues the discussion about how well the partnership is doing and what the conclusions should be. This plan may include specific inquiry activities to generate evidence that will support better conclusions, answer puzzling questions, or settle disagreements about what is accurate. The plan includes, among other artifacts, the collection of data on outcomes for enhanced learning for P–12 students, candidates, faculty and other professionals.

Other sources from which evidence can be drawn might include: reports of the history or progress of the partnership; policy statements and handbooks; family comments on the PDS; analysis of candidate placement; analysis of candidate accomplishment in the certification processes and on exams; records of candidate observation; teacher candidate journals; reports from inquiry activities; research monographs that consider an issue that is pertinent to the PDS Standards; minutes of governing boards and steering committees; newspaper reports on the partnership; yearbooks and other program artifacts; previous self-study reports;

videotape, etc.

A piece of evidence is described simply, including its source in the detail neccessary for the PSC to understand and decide whether or not it is good evidence. The validity of a piece of evidence may be challenged, and should be challenged, by PSC members. To be used effectively in this process, evidence is cited with its source (e.g., partnership documents, studies, participant reflections, and PSC observations of teaching and learning or of meetings) and summarized briefly.

Assess Partnership Accomplishments: Formulate Conclusions, Statements of Standing and Recommendations

The self-assessment process that the PSC conducts has three parts:

1. **Conclusions** are made **at the element level** for each standard and draw on the evidence collected and examined. At least one conclusion, (but usually not more than two or three conclusions), is made for each element.

2. **One statement of standing** is made **for each standard**, drawing holistically on the conclusions that were made at the element level. This statement represents the decision that the partnership has made as to the stage of development at which it sees itself for that particular standard.

3. **Recommendations** are made **for each standard**, and are designed to help move the partnership toward the next stage of development. Although framed at the standard level, recommendations may include specific element-level suggestions for development.

Each of these is more fully described below and accompanied by examples.

Conclusions

The PSC works with a range of partnership stakeholders to use the self-study process to connect the work of the partnership to the PDS Standards by examining evidence and formulating conclusions. Partnerships start with the identified strand(s) of PDS work and the collected evidence. These serve as entry points into the assessment process and are supplemented with other forms of evidence about the partnership and its work, as the PSC uses the Standards as organizing tools to frame the work of the partnership.

The Standards themselves, along with the elements, and the descriptive sections of the guidelines help guide the process of searching for evidence. Partnerships closely align the collection of evidence with the conclusions they draw. During the self-study inquiry process, the PSC builds tentative conclusions, matching them to the evidence, discarding and modifying their findings until they reach the final conclusions that the PSC and other stakeholders in the partnership see as best matching the data.

As the discussion proceeds, the PSC ties the collected evidence more closely to the issues surrounding its tentative conclusions and seeks new evidence that will sharpen its discussion. The evidence is used to test the accuracy of a conclusion and to ground the tentative conclusions in the work reality of the partnership.

Evidence and tentative conclusions go back and forth, shaping and informing each other. Tentative conclusions are set aside when the evidence is too weak to sustain them or when other more important conclusions push them out of the discussion. Working evidence may also be set aside, either because it is not confirmed

by additional evidence or because the conclusion the PSC had supported earlier has become irrelevant. New, refined, and less tentative conclusions, which are more accurate and useful, emerge.

Here is an example of a conclusion followed by the evidence that supports it. Note the way the source of the evidence is put in parentheses. It can also be woven into the text, but it is important to cite both evidence and the source.

Standard III: *Collaboration*. Element: *Engage in Joint Work.*

Conclusion: University and school faculty jointly plan and implement curriculum.

Evidence:

1. In developing new coursework for candidates when the program was initiated, university faculty met with teachers at the school to seek input, and this input was used to shape the content of the courses. (PSC personal recollections; drafts/ revisions of course syllabi)
2. Once courses for candidates were developed, the school's PDS Coordinator and Lead Teacher Mentor were asked to provide further feedback. (PSC personal recollections)
3. School and university faculty were responsible for developing the rubrics used to evaluate candidates. (Partnership Handbook; PSC personal recollections)
4. Based on feedback from candidates, university faculty and school faculty worked together to revise the sequence of required coursework. (PSC personal recollections)
5. The school's PDS Coordinator, other school faculty, and university faculty are jointly responsible for helping candidates develop the portfolios required for graduation from the university program. The final assessment of the portfolio is the joint responsibility of the university faculty member assigned to the team and the candidate's Lead Teacher Mentor. (Partnership Handbook; Portfolio Workshop outline; PSC personal recollections)
6. The school faculty frequently guest-teach or participate in university courses and campus experiences for candidates. (Syllabi; PSC personal recollections)
7. The school's PDS Coordinator teaches a university course required for candidates. (Syllabi)

Here is another example of a conclusion followed by evidence.

Standard V: *Structures, Resources, and Roles.* Element: *Create PDS Roles.*

Conclusion: The partnership engages in effective strategies for inducting candidates into professional practice.

Evidence:

1. Candidates work with a variety of school and university faculty through their

participation in PDS teams, interdisciplinary teams, other school-wide responsibilities, and graduate coursework. (Candidate Team Assignment Schedule; Mentoring Action Plans)

2. Candidates are fully responsible for the planning, implementation, and evaluation of 1-2 classes at the school. Candidates who are fully responsible for only one class have coaching responsibilities in two other classes. (Lesson plan books; Candidate Team Assignment Schedule)

3. Candidates have school-wide responsibilities such as serving on committees (student life, discipline, etc.), coaching sports, and hallway/dismissal supervision. (Committee lists; PSC personal recollections)

4. Candidates work with parents and community members through student-led conferences, school-wide seminars, and parent phone calls and conferences. (Conference schedules; phone call records; PSC personal recollections)

5. Candidates are publicly regarded as members of the school faculty with responsibilities appropriate to their experience.

Statement of Standing

The PSC creates a tentative statement of standing for each standard that draws, in a holistic way, on the evidence and the conclusions at the element level. In much the same way as conclusions are formed tentatively, tested against the evidence, and refined and made less and less tentative, statements of standing are formulated, tested, refined, and then finally written into the self-study.

Although evidence is provided and conclusions drawn on each element of the standard, only one statement of standing is made per standard. This statement of standing reflects where the partnership thinks it is along the developmental guidelines, when consideration is made of the evidence and conclusions on the element level.

Example: Statement of Standing for Standard I: *Learning Community*

> The PDS partnership is at the Developing Stage for Learning Community.
>
> The partnership would have somewhere between 5 and 15 conclusions related to the elements for the learning community standard.
>
> In this example the partnership has come to the following conclusions for Standard I: it is at the planning stage for developing inquiry-based and focused learning, and not all participants share a common vision of teaching and learning. Although they have some evidence for changes in instructional practices, integration of expertise does not yet exist. On the basis of these conclusions the partnership decides upon its statement of standing for this standard. It might then go on to construct several recommendations informed by the conclusions the partnership has developed.

Recommendations

The PSC develops recommendations for each standard, based on conclusions it made in assessing itself at the element level and at the standard level. Recommendations specifically focus on work that the partnership sees as necessary to move to the next stage on the developmental guidelines. They may refer to specific aspects of the identified PDS work and/or to specific conclusions at the element level. If there are recommendations for improvement, which lie outside of the partnership's own capacity to change, the self-study report clearly indicates what person or agency is responsible for helping the partnership bring about this improvement.

Example: Recommendations for Standard I: *Learning Community*

1. Continuing efforts are needed across the partnership to create a culture where the creation and dissemination of knowledge is valued by all educators as part of the teaching and learning process.
2. Teaching practices should be more public with stronger emphasis on the professional improvement of all participating faculty for the ultimate benefit of all students.
3. Communication is needed across the partnership to help participants understand the relationship between P-12 school improvement efforts and the PDS partnership.

Share and Finalize the Self-Study Report

The PSC's draft version of the self-study report is shared with the larger partnership community—e.g., a town meeting of the partnership, or the full university and school faculty. Although the working committee has the responsibility for the wording of the final report, it is agreed to and understood by the entire PSC. The self-study report describes the collaborative process the PSC uses to engage the entire partnership with the tentative findings.

The PSC prepares and then shares the final self-study report using the template that follows in Appendix D.

In preparing the self-study report, the PSC reaches final conclusions, statements of standing, and recommendations for each of the five Standards. All decisions about the content of the report and how it is written are made by the PSC as a whole using consensus, and not by individual PSC members. The PSC considers how what it says will affect the partnership and its constituencies and keeps in mind the long-term strategic use of the self-study report. The PSC works to produce a thoughtful presentation of its work that is mindful of the partnership's political realities, and that does not hide from real issues.

If the PSC cannot come to agreement about a particular issue under discussion, but agrees that it is an important issue to include in the self-study and should become an issue of future study and discussion, it notes this issue in the self-study conclusions, indicating what is in contention.

Implement the Follow-up

Self-studies are powerful experiences and can be very useful opportunities for partnerships to reflect on where they are, where they are going, and how their work meets the PDS Standards. Once a partnership has

gone through this process it needs to decide the next steps.

For partnerships primarily in the beginning or developing stages of the Standards, often the next step is to develop an action plan based on the recommendations to help move to the next stage on the developmental guidelines. This action plan should draw on resources both in and outside of the partnership — critical friends, consultants, and members of PDS networks in which the partnership participates. An action plan should include a specified review cycle, so the issues raised in the self-study are revisited in a set period of time. Partnerships benefit from tying these review cycles to the larger organizational leadership structures at the district and at the university and in the community (e.g., reports to the school board or the deans' council). Action plans should use inquiry to fuel continued self-assessment.

Partnerships which see themselves on most or all of the Standards at the *At Standard* level may wish to go on to host a visit for the validation it offers as well as the external credibility that comes with it. Partnerships electing to do this focus on their specific learning goals for hosting a visit.

Details for how to proceed with a visit can be found in the "Visit" section of this *Handbook*.

Table 1. Outline of Partnership Self-Study Activities

The PSC uses the self-study to connect the work of the partnership to the PDS Standards by examining evidence, formulating conclusions about each element in the Standards, making holistic judgments about the partnership's stage of development for each standard using the guidelines, and making recommendations for improvement.

Develop Conclusions

- Gather evidence about work
- Formulate tentative conclusions
- Collect more evidence
- Write one to three final conclusions for each element with evidence

Formulate Statements of Standing

- Review conclusions
- Look at where their conclusions fall on developmental guidelines
- Make holistic judgment having viewed all conclusions
- Write one statement of standing for each standard

Develop Recommendations

- Look at statement of standing and conclusions for each standard
- Develop specific recommendations for improvement for each standard
- Make 0 to 5 recommendations depending upon conclusion/standing

MULTIPLE SCHOOL PARTNERSHIPS: SELF-STUDIES

Definition of a Multiple School PDS Partnership

Increasingly, more and more PDS partnerships involve more than a single school. While it is critical to assess PDS work at the level at which teaching and learning occur within the PDS and the university, it is also useful to look across the entire partnership, including multiple school sites. The following approach to assessing multiple school PDS partnerships (MSPDS partnerships) assumes certain characteristics are valued within the multiple school PDS partnership and that there is a common vision for the partnership. Specifically, it assumes that all members value having shared goals, policies, and expectations for outcomes; that they choose to function as a learning community; that there is collaboration among the members; that they have common mechanisms for accountability and quality assurance; and that they are committed to diversity and equity. The MSPDS partnership creates structures and roles to support it as a partnership with many members, and it uses resources to sustain it. Sites in a multiple school PDS partnership are engaged in common work.

The assessment process described in this *Handbook* will work, with the modifications below, for multiple school PDS partnerships that either have the above characteristics or aspire to develop them.[1]

Purposes for MSPDS Partnership Self-Assessment

There are several reasons an MSPDS partnership may choose to do a self-assessment. For example, the higher education institution may have made the commitment to "go to scale"—building on the success of one or more single-site partnerships to work with more schools, more students, and more candidates. Additionally, the self-study process creates opportunities to enhance participation, ownership, collaboration and communication across the partnership. Perhaps the MSPDS partnership plans to host a visit and wishes to have the visitors examine the multiple school PDS partnership as a whole. Whatever the reason, the first step is for the MSPDS partnership members to clarify the goals of pursuing this level of self-study.

How Does a Multiple School PDS Partnership Self-Assessment Differ from a Single Site Self-Study?

The self-studies conducted by each PDS partnership in an MSPDS partnership focus heavily on the nature of teaching and learning for all participants. Much of the evidence is drawn directly from the individual school and university sites. An MSPDS self-assessment applies the Standards to the whole partnership. Guiding questions for an MSPDS self-assessment include:

1. How do we function as a learning community across the partnership?
2. How do we collaborate within the partnership?
3. Do we have a common approach to accountability and quality assurance?
4. Have we constructed roles and structures to support our work together?
5. Do we use our resources to support our goals?

[1] The PDS standards project has not field-tested the design proposed in this section. However, the framework described for doing such an assessment is based on feedback from partnerships that have engaged in a multiple school PDS partnership self-study, numerous experiences with single site self-studies and visits to multiple school partnerships over the last three years, and deliberations with PDS partners around the country who agree that MSPDS partnership self-studies and visits are important and possible.

6. What is our shared work?

7. In what ways are we, as a partnership, committed to equity and diversity?

The MSPDS partnership uses the individual self-studies conducted by the PDSs within it as one source of evidence to respond to these questions. For example, the single site self-studies will be sources of evidence of shared work and how it is carried out. They will also reveal how the individual PDSs see themselves as members of the broader partnership and how they view that broader partnership.

Additionally, there is another set of sources of evidence that the MSPDS partnership must look to for evidence for how well it is meeting the Standards. Documents, observations, records, and minutes of the meetings of the broader partnership will provide evidence for how well it is progressing toward meeting the Standards. For example, minutes of MSPDS partnership meetings may reveal that some school partners do not participate; or that school partners do not share equitably in certain kinds of decisions. Observations of partnership meetings may reveal the extent to which partners know and trust each other and are concerned with issues of the partnership.

Single site PDS self-studies result in statements of standing for each standard. The developmental guidelines included with the Standards will help determine such statements. The guidelines, however, pertain most directly to the single site PDS partnership and its work. The multiple school PDS self-assessment process does not rely on these guidelines in quite the same way. The MSPDS partnership process calls for the review of evidence and the formulation of conclusions for each standard followed by recommendations for future work. In contrast to the single site PDS self-study, it does *not* include statements of standing.

Steps in Conducting a MSPDS Partnership Self-Study

Following are guidelines for implementing such a self-assessment.

Establish a representative Partnership Steering Committee

In the examination of the MSPDS partnership as a whole, a PSC should be created and designed to assure representation of all the school partners, all university programs, local and district level members, union, association, and community representatives. A very large and complex multiple school partnership may establish a large, representative PSC and then use subcommittees as working groups. Those subcommittees conduct the steps of the self-study and report out to the larger group for consensus. A PSC with as many as twenty-two members has been reported to work effectively for purposes of examining a multiple school PDS partnership as a whole.

Conduct the inquiry process: Examine various sources of evidence

The self-studies completed by the individual PDS partnerships within the broad partnership contribute evidence the PSC will use to draw conclusions about how well the broader partnership is meeting the Standards.

A second source of evidence will come from documents and experiences of the partnership operating as a whole. These sources might include, for example, minutes of the MSPDS group meetings, observations about contributions from leadership in the school and university, changes in roles and structures to support

the partnership's initiatives, details about how committee assignments are made, types of professional development opportunities offered to PDS members, and attendance at these sessions by PDS participants.

Describe and define the nature of the PDS work to be considered

The single school self-studies will provide evidence of various examples of work. Shared PDS work may be more general than that of the individual PDSs (e.g., focused on the general notion of the functions of a PDS—supporting the preparation of candidates, preparing mentor teachers at all schools, supporting P-12 student learning) or it may be more specific (e.g., closing the achievement gap among P-12 students in the various partner schools). The PDS work shared among partners represents collaborative initiatives that exist across the PDS partnerships. Once they have identified shared work, the MSPDS Steering Committee will look for evidence for how the broad partnership carries out that work in ways that reflect the standards.

Assess partnership accomplishments: Formulate conclusions and recommendations

The standards serve as the lens for examining the partnership as a whole. Different from the individual PDS self-studies, the MSPDS self-assessment is concerned with each standard as it reflects the work of the partnership as a whole. The conclusions and recommendations that are formulated are at the broad partnership level. They reflect what is important holistically at the MSPDS level, acknowledging the differences in development that may exist between and among the different sites.

Consider the following Clusters of Questions

1. How does the partnership function as a learning community? Are all partners being supported as learners? Do all partners share a common vision of teaching and learning? Do the results of inquiry-based learning get shared and used across the partnership schools? Does the learning community extend beyond the individual schools in the partnership?

2. As a broad partnership, what are the assurances of accountability and quality? Are all PDSs contributing to and operating consistently with the criteria established for being part of the partnership? How is the MSPDS partnership supporting capacity building for "younger" PDS partners?

3. What are the examples of partners engaging in joint work across the MSPDS partnership? Are the roles, resources, and structures at the MSPDS partnership level supportive of collaboration and parity? How does the partnership recognize, in an official manner, the contributions of all PDSs?

4. Are all publics being served equally and equitably? Is there an effort to seek diverse participants when developing new PDSs?

5. Does the MSPDS partnership governance structure support PDS work being shared across PDSs? How are new roles created? How are they supported? Where is the funding coming from for the partnership operation? Who schedules meetings and are they at a time that assures opportunities to participate by all PDS partners?

The evidence resulting from the PSC's exploration of answers to these and other questions related to each standard will lead to conclusions about how the MSPDS partnership is doing with respect to the Standards. Recommendations are then developed that will move them forward.

Share and Finalize the Self-Study Report

The PSC will share the findings of its self-examination with all constituents concerned with the PDS partnership as a whole.

Implement the Follow-up

Plans for follow-up incorporate and support the individual site follow-up plans; in addition, the PSC members look across sites at the overall direction of the entire partnership. The success of implementing such an examination is likely to be further evidence of the nature and maturity of a multiple school PDS partnership.

PART II:
THE VISIT

CONDUCT OF A PDS PARTNERSHIP VISIT

The following information and details about conducting a PDS partnership visit are based upon the experience of visits to 16 partnerships from fall 1999 through fall 2000.

This *Handbook* assumes that NCATE and/or other coordinating agencies will sponsor and coordinate PDS visits.[2] Coordinating agencies may be regional, state, or national organizations, networks or governmental agencies that have arranged with NCATE to sponsor visits using the *Handbook* and the Standards. Throughout the text that follows, the term "agency" is used to refer to the organization performing this coordinating role. The process outlined below is likely to be equally applicable for those who choose to use it at the regional, state, or local levels.

Purpose of a PDS Partnership Visit

The second phase of the PDS Standards assessment process is for a partnership to host a visit by an external team of peer reviewers. At the completion of the self-study process, those partnerships that assessed themselves as meeting most or all of the Standards at the *At Standard* stage may wish to host a visit.

The visit is an important aspect of the assessment process. It complements the self-study and brings to bear the perspectives and professional judgment of outsiders, who, through a visit, have opportunities to understand things that can be learned only through experiencing them. The process of preparing for the visit, the visit itself, and the report of the visit team provide PDS partnerships with many benefits including:

1. an effective incentive for preparing a thoughtful self-study
2. a constant reminder that what is most important is what the partnership actually does, not what it says it does
3. the opportunity to learn from the professional judgment of peers
4. external credibility and validation of the PDS partnership, through the lens of national *Standards for Professional Development Schools*
5. support for the PDS partnership efforts in following up the self-study and developing a continuous improvement cycle.

Questions Framing the Visit Process

The goal is for the visit team to help the partnership engage in looking at its real work through the lens of the Standards. The central considerations that guide the visit are similar to those used to frame the self-study:

1. What is the work of the partnership, and how is it driven by inquiry and a focus on learning?
2. How well does the partnership's PDS work simultaneously focus on meeting P–12 students' needs and support the learning of faculty and candidates?
3. How well is each of the five Standards represented in the work, and in the partnership? Using the developmental guidelines, at which stage of development for each standard does the visit team see the partnership? What evidence supports this?

[2] To participate, the university partner of the PDS partnership requesting a site visit must be NCATE accredited (or in the process of seeking NCATE accreditation). As of spring 2001, an official NCATE visit process is not available. Please check the NCATE website, www.ncate.org for updates.

4. How well are the key concepts embedded in the Standards represented in the partnership and its work? These concepts are listed below and described in detail in the Introduction to *Standards for Professional Development Schools:*

   Time before the beginning

   Integration of professional and student learning through inquiry

   Placing students at the center of PDS work

   Learning in the context of practice

   Boundary spanning

   Blending resources

   Principal partners and institutional partners

   The expanded learning community

   The PDS as a standards-bearing institution

   Leveraging change

5. How can the visit team best respond to the partnership's purpose in hosting a visit?

6. What responses can the visit team have to the specific questions the partnership would like answered, and how do these responses tie into the partnership's development as a PDS, the nature of the work it is engaged in, and the visit team's sense of the partnership's standing on the Standards?

SUGGESTIONS FOR PREPARING FOR AND CONDUCTING THE VISIT

The following steps and procedures are based on what has been learned from the field test and provide a process that reinforces the collaborative, inquiry-driven characteristics of a visit. Each of them is elaborated in the section that follows:

1. Early planning for the visit
2. Guidelines and schedule for preparing for a visit
3. The visit team: composition, roles, and stance
4. The inquiry process: examination of evidence and sources of evidence
5. The assessment process: formulation of conclusions, statements of standing, and recommendations
6. Guidelines and schedule for visit activities
7. Implementing the follow-up

At the end of the discussion of the single-site visit, visits to multiple school PDS partnerships are addressed.

Templates for a single-site visit and a multiple school PDS partnership visit are included in Appendix D.

CODE OF CONDUCT FOR THE VISIT TEAM

Since the visit is a significant intrusion on the life of a partnership, the code of conduct for the visit team is critical. The code requires team members to demonstrate professionalism, integrity, and courtesy at all times during the visit process.

Each member of the visit team (including the chair and any observers) must agree to the following code:

- I will acknowledge the privilege inherent in being a visitor to a partnership and will conduct myself as a considerate visitor in an appropriate manner and with good humor.
- I will accept that my first priority during the visit is the educational welfare of all P-12 students at this partnership.
- I will work towards an informed, objective, and professional view of the work of the visited partnership and its community.
- I will explain the visit, including the purpose and process of the visit and my role in it, to any member of the partnership and its community, when it is appropriate to do so.
- If I have any potential conflict of interest with the partnership or with the visit process well before the visit, I will reveal them to the visit team chair, who will determine if a genuine conflict of interest exists. If there is such a conflict, I will resign from the visit team.
- I will abide by the procedures of the visit, including full participation in visit team activities and discussions, and the procedures for determining evidence and for drawing conclusions. I will work with the other team members to reach team consensus on conclusions.

Note: This code is from the Handbook for School Accountability for Learning and Teaching (SALT) School visit (2nd Edition, 1998). (Rhode Island Department of Education and Catalpa Ltd.) SALT adapted the code from Illinois Quality Review.

Roles for Participants, Before, During and After the Visit

Successful visits rely on the partnership, the visit team chair and its members, and the staff of the coordinating agency carrying out their roles and responsibilities professionally and in a timely manner. Participants from all groups need to be familiar with the entire process to better understand their roles. For example, visit team members, whose major role occurs during the visit, have important jobs to do both before and after the visit. Prior to the visit they carefully read the self-study, and after the visit they review and comment on the draft visit report. Details of the roles and responsibilities of all participants are woven throughout the following sections describing the steps of a visit.

Early Planning for a Visit

Deciding to Host a Visit

The decision to request a site visit is not one that is made lightly by a partnership. Although there are many benefits that may come from a visit, there are certainly costs in terms of time, money, coordination, and effort. Therefore, the first step in planning for a visit is to decide to do it. Partnerships need to be clear about who is part of the decision-making process and, once a decision is made to request a visit, to make sure this information is clearly communicated to others in and around the partnership who need to know. Partnerships with good long-term planning will also think about how the visit and potential follow-up fits into their strategic plans for PDS improvement.

Because it takes time to identify a visit team and prepare for the visit, the application process to host a visit should be submitted at least six months before the date of the desired visit.

Identification of Contacts

The decision to request a site visit is made by the partnership; usually the preparation work for scheduling the visit becomes the responsibility of the Partnership Steering Committee (PSC), the same group who conducted the self-study. Since the preparation work contains many logistical details and requires a different mindset than the self-study process, the PDS partnership appoints an individual as the logistics contact. Ideally, this person will have knowledge or experience with arranging for an NCATE accreditation visit since many of the processes are the same. In addition, the PSC should specify a technology support person who can help with the computer and technical needs of the visit team. These individuals will need to be in contact with agency staff and the visit team chair, and should use electronic mail regularly.

The PSC chair and the logistics contact are the contact persons for agency staff, the visit team chair, and all other individuals involved in the conduct of the visit.

Budgeting for the Visit

The PDS partnership will be responsible for all travel, room, and board expenses incurred by the team. Based on the PDS project field test and NCATE Board of Examiner team experiences, it is estimated that the partnership should budget a minimum of $1,000 per team member for out-of-state visitors. Any additional costs will be spelled out at the time of the request for a visit.

Selecting a Date of the Visit

The PDS partnership submits its preferred visit dates to the agency office when it requests a visit. Visit dates should optimize the team's ability to observe the work of the PDS partnership and to have access to key people. Dates requested should not conflict with university or school district vacations or any special school programs that would prevent observation of normal PDS activities. Visit dates should optimize the team's ability to observe the work of the PDS partnership and to have access to key people.

Setting up Communications, Arranging Logistics and Technical Support

During the semester before the scheduled visit, the logistics contact identified by the PDS partnership in consultation with the PSC chair and the agency staff, begins making logistical arrangements to ensure that

the team's visit runs smoothly. The following guidelines are designed to assist in making the necessary arrangements for the on-site visit.

Guidelines and Schedule for Preparing for a Visit

Arranging Logistics

(As soon as the dates of visit are confirmed)

It is the responsibility of the logistics contact and the PSC chair to complete the following arrangements and to provide all team members with necessary information.

Select Hotel/Motel for Site Visitors

1. The hotel/motel accommodations and room rate are consistent with arrangements made for NCATE Board of Examiner members. (The NCATE coordinator at the university can be contacted for this information).
2. The hotel should be located close to both the school site and the university, if possible. If the school is a substantial distance from the university, the hotel should be closer to the school, if appropriate accommodations are available. Partnerships requesting multiple school visits should identify the location that works best for the partnership—one which will provide the focal point of the visit.
3. A private single room should be reserved for each visit team member, with a planned arrival on Saturday and departure late afternoon on Wednesday.
4. A meeting room should be reserved in the hotel/motel where team members may work, beginning on Sunday. This room needs to be available 24 hours a day for the entire visit and needs to be secure so that materials and equipment may be left there.
5. There should be a restaurant in the hotel with food service until at least 11:00 PM. Except for the Sunday reception, partnership representatives should not plan to eat meals with team members. Meals often are used as work sessions.

Travel Information

1. Directions to the hotel/motel, university, and school.
2. Information on what airport should be used, the best type of ground transportation from the airport to the hotel, the approximate cost of the ground transportation, and approximate travel time from the airport to the hotel. The partnership may arrange to pick up team members at the airport or direct them to a cab or limousine.
3. Depending on the distance among sites to be visited, some team members may need to rent a car, or the partnership should arrange for someone to drive the team to the various locations.

Preparing Document and Exhibit Room Items

(4-8 weeks before the scheduled visit)

Several weeks before the visit, the PSC carefully selects a limited number of documents and exhibits it wishes to make available to team members.

The PSC sets up a workroom for the visit team at the school site, including the prepared documents and exhibits. This space should provide privacy for the team to meet and discuss activities while at the school. The visit team should have access to photocopying services.

All exhibit items should be clearly catalogued for easy reference and be accompanied by a note explaining their significance and why they were selected. Ordinarily, exhibits for a single school visit will not take up more space than a standard file transfer box — 8 ½" by 11" by 22". Multiple school partnerships will limit themselves to two such file transfer boxes, including self-studies from each PDS site.

The documents and artifacts may include sources of evidence used in the self-study, as well as reports, plans, and records of the partnership.

Analyses and data that consider P-12 student, candidate, and faculty performance should be made available, as long as they are clearly labeled and likely to be relevant to the visit team's work. Additional copies of the self-study should be available.

Even the best-prepared partnership will not be able to anticipate every document need of the visit team, particularly since the scope of the team's inquiry may go beyond the scope of the work described in the self-study. PSC chairs will be available during the visit to help provide additional materials requested by the visit team.

Preparing Draft Schedule

(6 weeks before the scheduled visit)

The PSC will develop a draft schedule.

The draft schedule needs to be sent to the team chair well in advance of the pre-visit conference call.

Guidelines for structuring the schedule are provided below. (See Appendix E for schedule template) The PSC chair and the visit team chair will finalize the schedule during the pre-visit conference call. The visit team may need to make changes, even during the visit, so the team can gather the information it needs about the work outlined in the self-study and about any broader areas of the partnership.

Pre-visit Conference Call

(3-4 weeks before the scheduled visit)

The PSC chair in consultation with the visit team chair will arrange a time for a pre-visit conference call.

Participants in the call should include: visit team chair, PSC chair, logistics contact, and technology support person.

The purpose of the pre-visit conference call is to review the proposed schedule for the visit and discuss arrangements for the team at the site. The following list suggests areas that should be included in this conversation.

Comprehensive Schedule

1. Are all roles represented within the schedule? (administrators, faculty, candidates etc.)
2. Is there a balance of time spent at the school(s) and university and with other partners?
3. Is adequate time allowed for team meetings during the day?
4. Does the schedule call for simultaneous meetings and interviews to make maximum use of the team?
5. Are there any meetings scheduled at which the whole team is asked to be present? Why is it important that they all be there?
6. Is there enough time for the reception and does it allow for informal interaction among site participants and team members?
7. Is there adequate time for travel between meetings?
8. Will escorts or directions be provided for moving from one location to another?
9. Who will attend opening and exit report sessions?

Tech Support

1. Will the requested equipment be available and set up, in operating order?
2. Will 2-4 computers, floppy disks, printer, paper, and LCD device be adequate?
3. Is contact information available for the tech support person — name, phone number?
4. Can the tech support person be available at team's first meeting on Sunday?
5. Document availability — Where will the documents needed for the visit team be found and in what formats?

Meal Scheduling

The PSC provides coffee and light refreshments in the on-site workroom designated for the visit team's use. The PSC arranges for lunch for the visit team, preferably in a cafeteria used by partnership participants. For lunch discussion meetings, the PSC arranges for take-out.

Confirmation of needs in hotel workroom (according to chair's preference)

Options should include:

- ☐ Newsprint
- ☐ Magic markers
- ☐ Masking tape
- ☐ Overhead projector
- ☐ Maps of area, campus, and schools
- ☐ Pens for transparencies
- ☐ Transparencies
- ☐ Pens, pencils, etc.
- ☐ Writing tablets
- ☐ Screen
- ☐ Post-its

Technology Needs – Should be set up and tested prior to meeting

- ☐ Computers (4) each w/ compatible word processing
- ☐ LCD projector
- ☐ Floppy disks
- ☐ Printer

Arrangements for reception:

Plan the Sunday evening reception (i.e., who should attend and the agenda)

Arrange daily contact between chair and PSC chair

Anticipate questions about expectations partners have for visit team's conduct and activity, e.g., not all classes will be visited and not all individuals will be interviewed.

After the pre-visit conference call, the team chair will contact team members either by phone or through e-mail.

Within two weeks of the visit, a final version of the visit schedule is sent to the team chair.

Specific interviews should be confirmed after the pre-visit conference call with the visit team chair, and prior to the visit. However, the team may need to conduct follow-up interviews with certain individuals to clarify issues and/or concerns raised during the team's deliberations. Because the size of the team is small, the team will not have time to interview all individuals (P-12 students, candidates, faculty, mentors, administrators, parents) involved in the successful operation of the PDS.

Preparing Packet of Materials for Visit Team

(2 weeks before the scheduled visit)

The host site prepares materials for visitors. These should include:

1. maps or clear directions to scheduled interviews
2. name tags for visit team members clearly identifying them for PDS representatives during interviews, etc. (PDS members may wear nametags during the visit, particularly in group interview settings.)
3. list of important telephone numbers:

   Tech support person

   Logistic contact

   PSC chair

   Hotel contact

Please note that special gift packages for the team members are highly discouraged.

Setting Up Team Workroom at the Hotel/Motel and On-Site Space

(1 to 2 weeks before the scheduled visit)

The visit team chair should be consulted regarding what he/she would like for meeting room arrangements and which of the supplies listed below will be needed in each area.

The host site is responsible for preparation of the workroom at the hotel so everything is in place when the team arrives, including computers. All computers, printers, and LCD projection devices are connected and hosts check to make sure all the technology is working properly. The host site also makes arrangements for disassembling the workroom immediately following the team's final use of the space.

(Actual set-up will be the evening before or morning of scheduled visit)

Prepare Presentation

(One week prior to visit)

Members of the PSC should prepare a short (15-20 minute) informal presentation of the highlights of the self-study for the opening meeting on the first day of the visit. See visit schedule for details.

Review Partnership-Wide Communication Plans

(One week prior to visit and during reception on first evening)

The PSC revisits its plans on how to communicate with all partnership faculty, staff, administrators, parents, and stakeholders about the purposes and processes of the visit, and about what might be expected of them.

This clear communication between the PSC and the rest of the partnership will be particularly important after the opening meeting, when the visit team and PSC members will discuss what will happen during the visit, how and when visitors will be observing in classrooms, etc. (See "opening meeting discussion" of the conduct of the visit.)

The Visit Team: Composition, Roles, and Stance

Appointment and Role of Visit Team Chair

Selection of the chair will reside with agency staff. It will be the responsibility of the visit team chair to communicate with the PDS partnership and his/her team members.

The team chair has overall responsibility for the conduct of the visit including logistical arrangements. A central responsibility of the chair is to ensure that the visit team follows its procedures in a way that will result in the most accurate and useful report possible.

Pre-visit:

1. Schedule the pre-visit conference call with the partnership.
2. Arrange and participate in the pre-visit conference call with PSC chair, the site logistics contact, and the technical personnel to finalize the schedule.
3. Confirm that hotel and meeting room arrangements are finalized.
4. Confirm that technology needs are satisfied.
5. Communicate with the team members about schedule and team assignments.

Visit:

1. Ensure the team's emphasis on the Standards.
2. Focus the team's work on the visited partnership.
3. Ensure that visit procedures are clear to all team members and that the team carries them out well.
4. Make team assignments and coordinate team members.

5. Manage and clarify agendas for team meetings.
6. Lead team discussions to insure that both evidence and conclusions are well considered.
7. Maintain an ongoing discussion about the progress of the visit with the representatives of the partnership designated by the PSC.
8. Participate as much as possible in evidence collection activities at the school and university.
9. Ensure the well-being of the team.
10. Lead the team members in the preparation of the team's report.
11. Make sure it is possible for the work to get done.
12. Work with the PSC chair to manage the visit, coordinate the schedule, and make sure needed materials are available. This will include the meal schedule, and making sure transportation and technology needs are met.

Post-visit:

1. Represent the team in post-visit discussions about the report, including the presentation of the team's findings to the school.
2. Send the draft report to team for editing within two weeks of visit completion.
3. Represent the team in making any final edits to the report after the team has disbanded.
4. Send the final report within three weeks of visit completion to the PSC chair to review for factual errors.
5. Send the final report to the partnership and agency staff.

Appointment and Role of Visit Team Members

Agency staff has responsibility for assigning the visit team members. The PDS visit team will consist of three to five members. The size of the team depends on a combination of factors, including the type of visit requested by the partnership and whether the visit will be conducted jointly with other assessment activities (e.g., NCATE accreditation visit, state approval visit, or regional accreditation of the school).

The following issues of balance on a visit team will be considered:

- representatives of diverse PDS constituencies, particularly from the school and university faculty
- people in new roles created for the PDS work
- at least two members of the team who have experience in visits to a PDS partnership

The composition of the full team should reflect, as closely as possible, the important characteristics of the partnership being visited.

The pre-visit role of the team centers on close reading and analysis of the self-study.

The role of the team during the visit focuses on selecting, gathering, analyzing, and summarizing data, and on working collaboratively with team members to reach conclusions, statements of standing, and recommendations.

The post-visit role of the team calls for reading and responding to the draft report edited and distributed to them by the chair.

Once the visit has begun and the team has assembled on site, the team discusses and agrees to a set of behaviors outlined in "the Stance" (page 30).

The Inquiry Process: Examination of Evidence and Sources of Evidence

Before the Visit: Examination of the Self-Study

The work of the visit team actually begins before the members arrive at the PDS partnership. The partnership will send each team member a copy of the partnership's self-study at least four weeks prior to the visit. The careful review of the self-study is a critical part of the process. Using the visit team's Matrices for Self-Study Review (in Appendix B) each team member is to come to the first visit team meeting grounded in the work of the partnership with the following:

- a strong understanding of the purpose and focus asked for by the partnership
- a preliminary screening of the self-study in relationship to the standards and developmental guidelines which will help shape the team's inquiry
- preliminary questions identified by the reading of the self-study

A major portion of the first meeting of the visit team will focus on sharing these careful reviews of the self-study.

On-Site Inquiry Activities of the Visit Team

The actual schedule of activities that a visit team follows will be tailored to each partnership within the constraints of the visit schedule outlined in the next section. While the visit team and its chair have ultimate control of their schedule, the PSC makes strong recommendations about what it wants the team to come to understand about the partnership.

The list below suggests the kinds of inquiry activities the team will engage in to conduct their assessment. Being on-site offers opportunities and access to sources of evidence about how the partnership works that are important complements to the kinds of evidence presented in the self-study. As the partnership constructs the proposed visit schedule, it should attempt to accommodate as many of these activities as possible. Some of these are specifically built into the template for the visit (Appendix E); others are suggested as important options to be selected based on the local context and needs.

1. Shadow P-12 students and candidates. This is an excellent introduction of the visit team to the partnership.
2. Discuss the process and substance of the self-study report with the PSC.
3. Conduct a focus group with PDS faculty of the partnership to discuss examples of P-12 student and candidate work.

THE STANCE

Mutuality: All participants, both visitors and those being visited, are responsible for the success of the visit.

Curiosity about Teaching, Learning and partnerships: We are unraveling a mystery together, not imposing our own models or beliefs on those being visited, or on the visitors.

Privileged Visitor: It is assumed that the purpose of the visit is positive and that visitors will have trusted access to information about the context.

Confidentiality: Visitors will not disclose private or sensitive information about those being visited, and hosts will not disclose private or sensitive information about visitors.

Respect for Context and Development: PDS partnerships grow in different contexts and are at different stages of development.

Engagement and Objectivity: Visitors balance involvement with site participants through conversation, interviews, and observation, maintaining enough distance to allow them to objectively view the work at the site.

Common Language: Common definitions of terms support clear communication.

Focus on Agreed-Upon Standards: Visitors and partnership members maintain focus on the PDS Standards.

Hard Evidence: Reporting of objective data from a wide range of sources provides evidence for the standards.

Willingness to Challenge Our Own Beliefs: "Be ever open to the infuriating success of the wrong methods."*

*Adapted by Design Team members from David Green, Her Majesty's School Inspectorate

4. Conduct individual and/or group interviews about how the partnership fares in regard to the PDS Standards and developmental guidelines, the "lived" roles of partnership faculty and other professionals as opposed to their organization-chart roles, the perceived barriers to moving forward. These interviews should include P-12 students, family, and community members.
5. Analyze P-12 student test data and candidate grades (as well as any other outcome data or information related to P-12 student and candidate performance suggested by the partnership) to understand the impact of the partnership on P-12 student and candidate performance.
6. Consider if measures of performance indicate any important equity gaps and what the partnership is doing about them.
7. Informally observe how members of the partnership refer to each other in daily language, staying aware of implications for perceived difficulties between partners.

8. Informally observe how partnership members group themselves in both structured and unstructured events (e.g., where partnership participants sit in the cafeteria).
9. Examine how the partnership uses resources, including P-12 student and candidate programming, to address equity.
10. Examine ways in which learning is embedded throughout the partnership.
11. Examine commonality of vision and the practice of teaching and learning across different role groups.
12. Observe "naturally" occurring meetings of the partnership.
13. Examine how candidates are integrated into program.
14. Visit classes for P-12 students taught by candidates and partnership faculty.
15. Attend seminars for candidates. Listen to follow-up discussions.
16. Examine documents (e.g., partnership agreements, records of resources allocated to PDS work.)
17. Examine portfolios of candidate and P-12 student work.

These activities—interviews, observations, and document analyses—are the sources of evidence for the data that visit team members will bring back to team meetings to share and analyze. One source may provide evidence in a variety of areas. For example, an observation in a classroom, followed by a short interview of the teacher and the teacher candidate who are co-teaching the class might provide evidence of:

- Learning Community, where support in the classroom is evident for multiple learners.
- Learning Community, where the interview shows how a joint school-university inquiry process was used to decide which literacy approach to use in the school.
- Collaboration, where the teacher, the teacher candidate, and the candidate's university instructor have worked together to align the university's literacy course with the approach used in the school.
- Structures, Roles and Resources, where the changing role of the classroom teacher is evident, as a teacher educator and true collaborator with the university faculty.

(See Appendix C for a list of guiding questions for conducting interviews and focus groups).

The Assessment Process: Formulation of Conclusions, Statements of Standing, and Recommendations

Nature of the Assessment Process

From its initial review of the self-study up until its preparation of the final report, the visit team is continuously engaged in a recursive inquiry process. After examining initial evidence from the self-study and other data sources, the visit team establishes a plan for data gathering that draws on the use of observations, interviews, and document analyses such as those described above. The visit team uses the visit schedule that follows to organize its work as it seeks further evidence about the nature of the partnership's PDS work and the implementation of the Standards. This plan may include specific inquiry activities to generate evidence that will support better conclusions, that will answer puzzling questions, or that will settle disagreements

about what is accurate. The plan includes the collection of data on outcomes for enhanced learning for P–12 students, candidates, faculty, and other professionals.

A piece of evidence is described simply, including the naming of its source in the detail necessary for the visit team to understand and decide whether or not it is good evidence. The validity of a piece of evidence may be challenged, and should be challenged, by visit team members. Evidence is cited with its source (e.g., partnership documents; studies; participant reflections; visit team observations of teaching and learning) and summarized briefly.

The assessment process that the visit team conducts has three parts and closely mirrors the process of the self-study:

- Conclusions are made at the element level for each standard and draw on the evidence collected and examined. At least one conclusion, but usually not more than two or three, is made for each element.
- One statement of standing is made for each standard. The statement draws holistically on the conclusions that were made at the element level. This statement represents the decision that the visit team has made as to which stage of development it sees the partnership at for that particular standard.
- Recommendations are made for each standard, and are designed to help move the partnership toward the next stage of development. Although framed at the standard level, recommendations may include specific element-level suggestions for development.

Each of these is more fully described below, and accompanied by examples.

Conclusions

The visit team works with a range of partnership stakeholders to use the visit process to connect the work of the partnership to the PDS Standards by examining evidence and formulating conclusions. Visit teams start with the identified strand(s) of PDS work and the collected evidence summarized in the self-study. These serve as entry points into the assessment process and are supplemented with other forms of evidence about the partnership and its work, as the visit team uses the Standards as organizing tools to frame what they see, hear, and read on the visit.

The Standards themselves, along with the elements and the descriptive sections of the guidelines, help guide the process of searching for evidence. Visit teams closely align the collection of evidence and the conclusions they are making. During the visit inquiry process the visit team builds tentative conclusions drawn out of the evidence, discarding and modifying team members' findings until they reach final conclusions that best reflect the data.

As the discussion proceeds, the visit team ties the evidence it has collected more closely to the issues surrounding its tentative conclusions and seeks new evidence that will sharpen its discussion. The evidence is used to test the accuracy of a conclusion and to ground the tentative conclusions in the work reality of the partnership.

The team weighs evidence and tentative conclusions drawn from one team member to another. Tentative conclusions are set aside when the evidence is too weak to sustain them or when other, more important

conclusions push them out of the discussion. Working evidence may be replaced, either because it is not confirmed by additional evidence or because the conclusion it supported has become irrelevant. New, refined, and less tentative conclusions emerge.

Here is an example of a conclusion followed by the evidence that supports it. Note the way the source of the evidence is put in parentheses.

> Standard II: Accountability and Quality Assurance. Element: Assure public accountability
>
> Conclusion: Mentoring/Supervision
>
> > The school district and the teacher union have agreed to a well-articulated career ladder and merit pay system for teachers. Movement on the career ladder involves a rigorous screening process. Each level has increased responsibility for leadership within the district. The PDS partnership uses the career ladder in selection and quality assurance of teachers who mentor pre-service teachers and assume coordinator roles.
>
> Evidence
>
> 1. The various teacher leadership roles in the program are articulated, as are teacher selection criteria, Lead Teacher, Mentor and Career Teacher responsibilities, and rewards. (Teacher contract, budget, interviews with PDS panel, Site Steering Committee, and participants)
> 2. Mentor training is available to teachers through the [Public School System]. Several members of the PDS teams stated that mentor training should be required. (Interviews with PDS coordinator, PDS team members)

Here is another example of a conclusion followed by evidence, with the source woven into the text.

> Standard IV: Diversity and Equity. Element: Evaluate policies and practices to support equitable learning outcomes
>
> Conclusion: Individual needs of a diverse population are being addressed through a variety of approaches.
>
> Evidence:
>
> 1. The achievement gaps have narrowed among the diverse ethnic and racial student groups, as presented in the documentation notebook.
> 2. As a magnet school, [the PDS] has attracted a diverse student and faculty population, based upon enrollment figures provided.
> 3. The self-study and documentation notebook indicate that an inclusion model exists to serve the special needs of students.
> 4 In reading, there is an individual educational approach or plan for each student,

which is monitored by faculty and the principal in the principal's notebook.

5. A commitment exists to serve students of lower income and minority status, as outlined in the documentation notebook.

Here is another example of a conclusion.

Standard III: Collaboration. Element: Engage in Joint Work

Conclusion: Collaboration and involvement among PDS participants influences the teaching, learning, policymaking, and decisionmaking at the school.

Evidence:

1. Active involvement of the School Based Decision Making Council (SBDMC), PSC, parents, university and school faculty in the site-based management of the PDS results in improved academic achievement, as observed through shadowing faculty, observing meetings and reviewing individualized student achievement data tracked in the principal's notebook.

2. Observing a site-based decision making committee meeting revealed that the PDS has received district permission to implement its own unique report card and frequently seeks district support to supplement district-approved curricula with alternative research-based best practices.

Statement of Standing

The visit team creates a tentative statement of standing for each standard that draws, in a holistic way, on the evidence and the conclusions at the element level. In much the same way as conclusions are formed tentatively, tested against the evidence, and refined and made less and less tentative, statements of standing are formulated, tested, refined, and then finally written into the visit report.

Although evidence is provided and conclusions drawn on each element of the Standards, only one statement of standing is made per standard. This statement of standing represents the visit team's assessment of the developmental stage of the partnership on that standard based on the evidence and conclusions for all the elements of that standard.

This is an example of an evaluation process to arrive at a statement of standing.

Standard I: Learning Community

The visit team would have somewhere between 5 and 15 conclusions related to the elements for the learning community standard. These, along with the evidence that supported them, become the basis for the statement of standing. Imagine that the visit team has concluded that the partnership is at the planning stage for developing inquiry-based and focused learning, that not all participants share a common vision of teaching and learning, and that, even though the partnership shows some evidence for changes in instructional practices, integration of expertise does not yet exist. Therefore the visit team might conclude that this partnership is at the Developing Stage for the Learning Community standard and would go on to construct several recommendations informed

by the conclusions they had formulated.

Although a simple statement of standing will suffice ("We find the [partnership being visited] to be at the Developing Stage of the Learning Community standard"), visit teams may wish to explain their rationale in making that finding.

Recommendations

The visit team develops recommendations for each standard, based on conclusions it made in assessing the partnership at the element level and at the standard level. Recommendations specifically focus on work that the visit team thinks will be necessary in order for the partnership to move to the next stage of the developmental guidelines. The visit team may refer to specific aspects of the identified PDS work and/or to specific conclusions at the element level. If there are recommendations for improvement which lie outside of the partnership's own capacity to change, the visit team report clearly indicates what person or agency is responsible for helping the partnership bring about this improvement.

Here is a set of recommendations, focusing on the example of a conclusion used above for Standard II: Accountability and Quality Assurance, Element: Assure public accountability. The conclusion was about Mentoring/ Supervision and noted the well-articulated career ladder and merit pay system for teachers, with clearly delineated movements on the career ladder.

Recommendation 1:

Although the amount and quality of mentoring was extensive, there was no mandated training. We recommend that all members of the PDS teams have common professional development on mentoring, adult development, and candidate development from novice to expert.

Recommendation 2:

We also recommend the establishment of a process or forum, which enables experienced mentors to reflect on their work. This process or forum could engage teachers across the different PDS sites, creating a new learning community.

Guidelines and Schedule for Visit Activities

These guidelines assume a four-day visit that begins Sunday morning and ends Wednesday afternoon. It also anticipates the team members arrive prior to 6:00 p.m. on the Saturday before the actual visit begins.

The order of events in the schedule is deliberate and is designed to support the team in preparing a useful, accurate, and coherent report. Final decisions about the inquiry activities to take place during the visit are the responsibility of the visit team chair, working in collaboration with team members and with the PSC chair.

Team discussions are always high priority events. During a visit to a partnership, there is always much more than is possible for a visit team to see and experience. Because team discussion time is often encroached on by requests from the partnership and needs of the team members, the visit team chair, the team members, and the partnership participants need to work together to treat the team's meeting time as sacrosanct. While it may be possible to adjust the scheduled time for a meeting, the team requires the total amount of discussion time.

Times are for the purpose of providing some guidance and should be adjusted to meet the realities of the partnership's schedule.

For example, because PDS partnerships extend across university and schools, schedules will have to be adjusted to accommodate observing university seminars or classes that are held late in the day. This may require scheduling visit team discussions later.

Partnerships need to respond flexibly to changes in requests for documentation, interviews, and observations as the visit team inquiry process evolves. See visit schedule template in Appendix E.

Saturday Arrival

Team members should arrive at the PDS partnership hotel on Saturday. The partnership will arrange transportation for the team members from the airport to the hotel.

Team members should plan to arrive early enough on Saturday so that they can participate in an informal team dinner at an area restaurant. This provides an opportunity for team members to get to know one another.

Sunday Morning and Afternoon

Planning Meeting of team and review of documents

In this meeting, the visit team develops strategies to work together that minimize biases and maximize the use of individual strengths. The team will look over the schedule for the week and plan data-gathering, analysis, and writing assignments, including primary and secondary roles that each person might play in the process. The team will discuss the self-study in preparation for the opening meeting with the PSC. This discussion should not in any way be judgmental or conclusive, but rather should focus on questions of fact (what else do team members want to know), questions and ideas about how the work described in the self-study connects to the PDS Standards, and thoughts about the kinds of evidence members might want to collect. The team chair will brief the visit team members on preparation activities for the visit, team procedures, and the documents available in the assigned team room.

The team reviews the schedule and determines individual responsibilities for data-gathering, analysis, and writing assignments. Part of this planning includes how the team will gather data on the Standards and the developmental guidelines, address how the work of the partnership integrates the four functions of a PDS, and how the team will synthesize these findings into its analysis and report.

Sunday at 5:00 p.m.

Opening Meeting of the PSC and visit team (30-40 minutes)

This will be the first formal opportunity to discuss the focus of the visit. The discussion of the focus of the visit will be moderated by the PSC chair. Although informal in tone, this session has some procedural requirements:

1. 20 minutes of PSC presentation on self-study.

   •What are the examples of PDS work described in the self-study?

   •What does the PSC see as the most important learning from the self-study?

2. A few minutes of presentation by the partnership about its focusing questions—what the site would like the visit team to particularly attend to.

3. 10 minutes of presentation by the partnership that focuses on conditions and context of the partnership that have enabled the partnership to move forward and do their work and those that they view as barriers. This time is designed to allow the team to get a sense of the partnership context and how it has shaped the partnership's development with respect to the PDS Standards.

4. 5 to 10 minutes of clarifying questions by the visit team following the PSC presentation. The visit team asks the PSC for any clarification needed.

Sunday 6:00 – 7:30 p.m.

Reception and Dinner with PSC and Other Participants.

Attendance should be limited to the visit team, PSC members, and key participants of the PDS partnership being visited.

Introductions and brief presentation by the team chair. The team chair introduces other team members.

The chair facilitates a brief discussion of the conduct of the visit to address how visit team members will operate as guests of the partnership. This includes discussion of the "Stance" and Code of Conduct, as well as mutual expectations about how visit team members will conduct interviews and classroom observations. Some possible questions:

1. Will visitors just drop in to classes, or enter by pre-arrangement only?

2. If a lesson is in progress, should faculty members who are being visited just continue, or should they stop, introduce the visitor, and carry on? Or should they stop and make their class and time available to the visitor?

3. What expectations are there for follow-up and/or feedback after a classroom visit?

4. Will all faculty members be visited, and what does it mean if someone is not visited?

5. What are the expectations for meetings that the visit team will sit in on during the visit?

6. Will they simply observe, or would they like an opportunity to speak to or ask questions of the group?

7. Will the visitors be attending naturally occurring meetings, during their stay, or are some of the meetings being arranged specifically for them? Since visit team members sometimes need to shift direction and change plans to gather data that had not been anticipated, it will be useful to know which meetings or other events have been scheduled specifically for them, so they will be sure to attend them.

Sometime during the first day, the team chair should meet with the PSC chair to work out any last minute details for the next day. This may be before or after the reception/dinner or the opening meeting, but needs to happen on the first day.

Monday

The purpose of this second day schedule is to ground the visit team thoroughly in the daily work of the partnership. Although the team should end the day with a solid sense of the partnership, their perspective will be full of puzzles, uncertainties, and unanswered questions. This is an important part of the beginning to the visit process.

7:00 – 8:30 a.m. The visit team members arrive at the school site before the students and go to the assigned team room.

They review any questions about their daily schedule. The PSC chair links team members with the students or candidates they will follow.

8:30 a.m. – noon Each team member shadows either a P-12 student or a candidate for anywhere from an hour and a half to a half-day. The selected candidate should teach at least one class and have a reasonably full schedule for that day, which ideally would include activities at both the school and the university sites. Shadowing may include informal interviewing of P-12 students or candidates between classes, examination of their work, and so on.

By mid-morning some team members may begin interviews, other classroom observations, or focus groups.

Noon – 1:00 p.m. Lunch and team meeting

2:00 – 5:00 p.m. For the rest of the afternoon, several types of meetings and events are scheduled. For example:

- Meet with representatives of the university and school.
- Meet with district administrators who make administrative/management decisions about the partnership. (Visit team chair should attend this meeting along with at least one other team member.)
- Other team members should observe in classes at the university.
- Interview either individually, or in focus groups: PDS school faculty, candidates, university faculty (both involved and uninvolved with the PDS), family members, and teacher union or professional association representatives.

6:00 – 7:00 p.m. Team Dinner

7:00 – 10:00 p.m. Team meeting at the hotel

Team members discuss their experiences of shadowing the P-12 students and candidates, as well as their interviews, observations, meetings, and document analysis. Note that since a portion of the final report will summarize how information was collected, it will be helpful if the visit team develops a record-keeping system to keep track of how many classes were observed, how many faculty members interviewed, and so forth.

Team members begin to build an emerging view of the partnership by sharing their initial impressions and developing tentative hypotheses, which may turn into possible conclusions. This conversation may be organized by elements for each standard using the developmental guideline stages.

Team members may find the matrix and the accompanying developmental guidelines (in Appendix B) useful in the following ways:

- to help begin to make connections and develop an overview of the partnership
- to raise questions about the partnership that require further clarification
- to identify further evidence that needs to be collected

The team reviews its schedule for the next days, noting individual assignments.

Tuesday

The team's focus shifts to filling in the missing pieces of the picture of the partnership that is beginning to emerge. While some specific follow-up observations of classrooms will still take place today, more of the focus shifts to the organizational arrangements and procedures that support the work of the partnership. This is the last day the visit team is immersed in the work of the partnership. It is important that all major remaining puzzles and uncertainties be addressed. This may result in last minute alteration of the schedule. The team finishes this day with much more clarity about its general perspective about the partnership. It has begun to build its initial conclusions about the elements for the report, and to "think bigger" about how the standards, functions, and the work of the partnership fit together to create a portrait of the PDS partnership.

7:30 a.m. — The team chair meets with the PSC chair to go over the team's schedule and to iron out any problems.

8:00 a.m. – noon — The schedule for this day will be tailored for each particular partnership.

The morning should focus on filling in missing pieces, and where possible observing the work of the partnership faculty, both at the university and the school in meetings and informal discussions.

Noon – 1:30 p.m. — Lunch and team meeting

1:30 – 5:00 p.m. — Since many of the observations have been based at the school site, visit teams should pay particular attention to ensuring that they have good data on how the partnership engages, affects, and is visible at the university and how it connects with other PDSs working with the university. Different constituency groups that might be included in meetings and interviews are:

- P-12 students from other schools
- Non-PDS candidates within the professional education program
- Recent graduates from both the PDS and non-PDS programs.
- Faculty and staff members of affiliate schools or other PDSs in the partnership
- Representatives of other PDSs in the partnership at their different sites.

6:00 – 7:00 p.m. Team Dinner

7:00 - ?? p.m. Discussion meeting and report writing of the visit team at hotel

(See Appendix D for report template)

The team debriefs its individual team members about the day's activities, with a focus on the questions raised at its last meeting.

The team builds its conclusions about each element within each of the five PDS Standards. These will be substantive statements that include both positive judgments as well as those that may suggest need for improvement. All conclusions must have supporting evidence.

The team starts to tentatively assign a statement of standing on each standard in reference to the developmental stage they believe the partnership has reached. In addition, the team begins to propose recommendations that could help move the partnership towards improvement on each standard.

At this point, the team should plan and, if possible, begin its draft report writing. By this time, teams will have decided on how they want to divide the writing work. Regardless of the approach, the chair should ensure that the entire team has had ample time to review and discuss any conclusions, statements of standing, or recommendations before they become a part of the report.

Wednesday

This day is devoted to completing the report. Selected pieces of evidence become the final evidence that informs and supports the team's conclusions. Most of the time is spent discussing the evidence, drawing conclusions, and looking for integration of the PDS Standards and the work of the partnership as the team's report is completed.

8:30 a.m. – 2:00 p.m. Writing the final report

The team reviews and finalizes its conclusions on each element, the holistic statement of standing on each standard, and recommendations on each standard. The evidence is presented and the team reaches consensus on each part.

The team chair facilitates the team's discussion about the preparation of the remaining report sections: "Purpose and Limits," "Portrait of Partnership" and "Summary of Findings." When the team comes to agreement, the chair takes responsibility for having those sections prepared.

The team looks ahead to the exit protocol and plans its report to partnership faculty and community.

The team debriefs the visit.

2:30 p.m. Exit protocol

Members of the PSC should be present. The PSC may invite partnership faculty and

candidates. Decisions about inviting others is solely up to the PSC.

This vital part of the visit provides an opportunity for the visit team to share, orally, key aspects of what it found during the visit. It follows a format similar to the opening meeting but instead of the partnership presenting its self-study, the visit team will present its report, followed by clarifying questions by the PSC. The recommended format for this session follows:

- A 15-20 minute presentation of key areas of the report by the visit team. The chair or members of the visit team will read the conclusions for each element, important evidence, statements of standing on each standard, and selected recommendations.
- The team members will report on how they responded to the focusing questions that the PSC has asked them to address. During the presentation, PSC members will listen, and take notes.
- Five to ten minutes of clarifying questions from the PSC will follow the presentation.
- No copies of the report are made available.

Implementing the Follow-up

After the visit is completed, the visit team chair edits the team's work, compiles a draft of the report, and sends copies of the draft to each team member and to the agency office for editing. Recommendations from team members and agency staff edits are incorporated into the final draft report.

Once the draft report is finalized, the visit team chair sends one copy of the final draft to the PSC chair, who should review it for factual errors only and communicate any recommended changes to the visit team chair. Within 30 days of the visit, one copy of the final report is submitted to the agency staff and to the PSC chair by the visit team chair.

In the month following its receipt of the report, the partnership meets to discuss the visit team findings and to discuss how the visit and the findings fit into the PDS's growth and development. Within two months of receipt of the report, the partnership sends a one-page summary of this to the visit team chair with a copy to the agency, noting how the visit team and its report connect to the planned follow-up at the partnership, and its efforts at continuous improvement.

Partnerships with carefully planned follow-up activities reap greater benefits from a visit. Partnerships may decide to use the final visit team report by:

1. bringing the report back to an all-PDS annual retreat and using it to inform next steps of the overall partnership, or the work of its subcommittees in ways that build stakeholder commitment
2. using action research initiatives within the partnership to foster change and further inquiry in areas identified in the visit for growth and development
3. using the suggestions of the visit report to guide the hiring and use of consultants, or other efforts to improve the partnership in ways that are suggested by the recommendations of the report; and/or
4. sharing the visit team report within a PDS network, or with a set of "critical friends," or cooperating PDSs in ways that help the partnership move forward with its objectives

MULTIPLE SCHOOL PARTNERSHIPS — VISITS

Since an increasing number of PDS partnerships involve more than a single school, it makes sense to explore how the self-study and visit processes of this *Handbook* can be modified to apply to multiple school PDS (MSPDS) partnerships. As noted in Part I, applying the Standards to an MSPDS partnership only makes sense if certain characteristics are valued within the multi-site partnership and there is a common vision for the partnership. Specifically, applying this framework assumes that all the members value having shared goals, policies, and expectations for outcomes; that they choose to function as a learning community; that the members collaborate; that they have common mechanisms for accountability and quality assurance; and that they are committed to diversity and equity. Applying the framework also assumes that the multi-site PDS partnership creates structures and roles to support itself as a partnership with many members; that it uses resources to sustain itself; and that sites in a multiple school PDS partnership are engaged in common work.

Statements of Standing

With some important modifications, the assessment process described in this *Handbook* will work for multiple school PDS partnerships that either have the above characteristics, or aspire to develop them.[3] One major difference concerns the use of the developmental guidelines and statements of standing. Single-site PDS visits result in statements of standing for each standard. The stages of development included with the standards serve as the guidelines for determining such statements. These stages, however, pertain most directly to the single site PDS partnership and its work. The multiple school PDS visit does not rely on the developmental guidelines and, in contrast to the single site PDS self-study and visit, it does not include statements of standing. In a large multiple school partnership it is likely that there will be PDSs in various stages of development, so a global statement of standing would not have much meaning. Instead, the MSPDS process calls for the review of evidence and the formulation of conclusions for each standard followed by recommendations for future work.

Locus of Activity

A second major difference concerns the locus of the inquiry activities of the visit team. Because the focus is on aspects of the partnership that cut across sites, the visit team needs to gather evidence of cross-site activities, commitments, structures, etc.

On the other hand, to look only at activities across sites might lead to an overly superficial visit, cut off from the level of PDS work where teaching and learning occur. To prevent this, multiple school PDS partnership visit teams anchor their inquiry by developing an understanding of the PDS implementation in one or a few sites, even as they are looking at broad partnership issues across all of them.

Steps in Conducting a Multiple School Partnership Visit

Select and Anchor PDS Sites for the Visit

To accommodate the team's need to "sample" PDS work at selected sites, as part of its request for a site visit, the MSPDS partnership identifies two or three PDS sites to help anchor the visit.

3 The PDS standards project has not field-tested the design proposed in this section. However, the framework described for doing such an assessment is based on feedback from partnerships that have engaged in a multiple school PDS partnership self-study, numerous experiences with single site self-studies, visits to multiple school partnerships over the last three years, and deliberations with PDS partners around the country who agree that MSPDS partnership visits are important and possible.

Some may pick what they see as their "leading" PDSs; others may pick those that seem representative, or mid-range. In some MSPDS partnerships one or more sites may be more interested in being visited, or have greater capacity to host a visit. Whatever choice is made, the anchoring PDSs must have completed self-studies and assessed themselves as "At Standard" on most, if not all of the standards. In any case, the partnership decides, and as part of its request for a visit, provides an explanation for the choice. Visiting anchor sites does not lead to a PDS standards assessment of those sites. Such visits provide evidence for the MSPDS partnership assessment. There are no statements of standing or conclusions that focus exclusively on the anchoring sites.

Clarify the Nature of the MSPDS Partnership and the Purposes for the Visit

To plan its inquiry activities, and to understand why it is there, the visit team needs to understand the history and nature of the multiple school PDS partnership: how it got started; what is the nature of the joint work and activities; and what is the "glue" that keeps it together. It needs to understand why the MSPDS partnership chose to do a self-assessment and a visit. Perhaps the higher education institution has made the commitment to "go to scale"—building on the success of one or more single-site partnerships to work with more schools, more students, and more candidates. Perhaps the self-study and visit processes are viewed as opportunities to enhance participation, ownership, collaboration, and communication across the partnership. Whatever the reason, the MSPDS partnership members have to make clear to their visitors their goals for the visit.

Establish a Focus for the Multiple School PDS Partnership Visit

The single site visit described in this *Handbook* applies the standards to the work of a single school and its partners. An MSPDS visit applies the standards to the whole partnership. Guiding questions for an MSPDS visit include:

1. How does the MSPDS Partnership function as a learning community?
2. How do the schools, university, and other partners collaborate within the partnership?
3. Does the MSPDS partnership have a common approach to accountability and quality assurance?
4. Has the partnership constructed roles and structures to support work among its members?
5. How does the MSPDS partnership use its resources to support its goals?
6. What is the shared work of the MSPDS partnership?
7. In what ways is the partnership committed to equity and diversity?

These questions also frame the MSPDS meta-self-study. Meta-self-studies draw on the individual self-studies done by members of the MSPDS partnership. These individual self studies show how the individual PDS sees itself as a member of the broader partnership and how it views that broader partnership. They provide evidence of how the individual PDSs collaborate with each other as well as with the university and other partners.

Drawing on these single-site self-studies and other sources of evidence (documents, observations, records, and minutes of the meetings of the broader partnership) the MSPDS completes a meta self-study that provides evidence for how well the whole partnership is progressing toward meeting the PDS Standards.

This document becomes the starting point for the MSPDS visit team. It is supplemented by the single-site self-studies and augmented by the observations, interviews, and document analysis done by the visit team. The inquiry activities of an MSPDS visit team are outlined below.

Identify PDS Work to be Considered

PDS work that cuts across an MSPDS partnership may be more general than that of the individual PDSs (e.g., focused on the general notion of the functions of a PDS—supporting the preparation of candidates, preparing mentor teachers at all schools, supporting P-12 student learning) or it may be specific (e.g., closing the achievement gap among P-12 students in the various school partners). In their meta-self-study, the MSPDS Steering Committee will have identified this shared work and begun to collect evidence of it. Understanding the nature of this shared work is a critical step for the visit team.

Conduct the Inquiry Process: Examining Various Sources of Evidence

In addition to the data provided by the combined, synthesized MSPDS meta-self-study, the visit team will look at documents and experiences of the partnership operating as a whole. These sources might include, for example, minutes of the MSPDS group meetings, interviews, and observations about contributions from leadership in the school and university, changes in roles and structures to support the partnership's initiatives, details about how committee assignments are made, types of professional development opportunities offered to PDS members, and attendance at these sessions by PDS participants.

In addition to conducting some of the same inquiry activities that visit teams of a single-site PDS would do, the visit team will:

- observe MSPDS broader partnership activities and events
- interview a range of PDS participants about the nature and joint work of the MSPDS partnership
- examine contracts, agreements, and resource commitments that undergird the MSPDS broader partnership
- look at the degree to which the partnership revolves around one partner (the university, if there is one university with a number of schools) and how much each of the schools connect with one another
- investigate, through interviews, observations and document analysis, decision-making processes of the MSPDS broader partnership
- conduct role-like focus groups to learn how the standards are applied across the MSPDS partnership

Additionally, the team may make other necessary adjustments in the visit template — for instance, the format and attendance of the opening and closing sessions may need to be changed to allow for the multiple school nature of the partnership.

Assess Partnership Accomplishments: Formulate Conclusions and Recommendations

The PDS Standards serve as the lens for examining the partnership as a whole. Different from the single site PDS visit, the MSPDS visit is concerned with each standard as it is reflected in the work of the partnership as a whole. The conclusions and recommendations that are formulated are at the broad partnership level.

They reflect what is important holistically at the MSPDS level, acknowledging the differences in development that may exist between and among the different sites.

Questions Framing the Visit

1. How does the partnership function as a learning community? Are all partners being supported as learners? Do all partners share a common vision of teaching and learning? Are the results of inquiry-based learning shared and used across the partnership schools? Does the learning community extend beyond the individual schools in the partnership?

2. As a multiple school PDS partnership, what are the assurances of accountability and quality? Are all PDSs contributing to and operating consistently with the criteria established for being part of the partnership? How is the broad partnership supporting capacity building for "younger" PDS partners?

3. What are the examples of partners engaging in joint work across the broad partnership? Are the roles, resources, and structures at the broad partnership level supportive of collaboration and parity? How does the partnership recognize in an official manner the contributions of all PDSs?

4. Are all publics being served equally and equitably? Is there an effort to seek diverse participants when developing new PDSs?

5. Does the MSPDS broad partnership governance structure support PDS work being shared across PDSs? How are new roles created? How are they supported? Where is the funding coming from for the partnership operation? Who schedules meetings and are they at a time that assures opportunities to participate by all PDS partners?

The evidence resulting from the visit team's exploration of answers to these and other questions related to each standard will lead to conclusions about how the MSPDS partnership is doing with respect to the standards. Recommendations are then identified that will move them forward.

Implementing the Follow-up

Plans for follow-up incorporate and support the individual site follow-up plans. Additionally, they look across sites at the overall direction of the entire partnership. Many of the strategies suggested as follow-up approaches for the single-site would apply — using the report in an all-MSPDS annual retreat; incorporating action research initiatives within the partnership to foster change; using the suggestions of the visit report to guide the hiring and use of consultants; and so forth.

APPENDIX A:
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Kent State University/Allen Elementary
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APPENDIX B:

DEVELOPMENTAL GUIDELINES AND MATRICES FOR SELF-STUDY REVIEW

STANDARDS I – V

Standard I: Learning Community—Developmental Guidelines

The PDS is a learning-centered community that supports the integrated learning and development of P–12 students, candidates, and PDS partners through inquiry-based practice. PDS partners share a common vision of teaching and learning grounded in research and practitioner knowledge. They believe that adults and children learn best in the context of practice. Learning supported by this community results in change and improvement in individual practice and in the policies and practices of the partnering institutions.

The PDS partnership includes principal and supporting institutions and individuals. The principal PDS partners are members of the P–12 schools and professional preparation programs who agree to collaborate. The supporting PDS partner institutions include the university, the school district, and the teacher union or professional education association(s). Arts and sciences faculty, other interested school and university faculty, family members, community members, and other affiliated schools are important PDS participants in the extended learning community.

Element	*Beginning*	*Developing*	*At Standard*	*Leading*
Criteria used to construct levels	*Beliefs, verbal commitments, plans, organization, and initial work are consistent with the mission of PDS partnerships.*	*The PDS partners pursue the mission of a PDS partnership with partial institutional support.*	***The mission of the PDS partnership is integrated into the partnering institutions. PDS work is expected and supported, and reflects what is known about the best practices.***	*Advanced PDS work is sustaining and generative, leading to:* *1. Systemic changes in policy and practice in the partner institutions.* *2. Impact on policy at the district, state, and national levels.*
Support Multiple Learners.	PDS participants plan an environment that simultaneously supports the learning of P–12 students, candidates, faculty, and other professionals. Their plans include the creation of field experiences and clinical practice to provide candidates with opportunities for full immersion in the learning community, professional development opportunities for faculty and other professionals, and an inquiry orientation to improve P–12 student learning.	The PDS environment provides support for integrated learning experiences that focus on adult and children's learning, but these experiences may occur unevenly or without intentional communication among implementing groups. Candidates are in the PDS for extended periods of time and some effort is made to incorporate candidates into the school faculty. Candidates share responsibility with PDS partners for the learning of P–12 students. School faculty participate in candidates' preparation by serving as mentors, co-teachers, and colleagues in study groups,	The PDS provides an environment that simultaneously supports the learning of P–12 students, candidates, faculty, and other professionals in an integrated way. Field experiences and clinical practice in the PDS provide candidates with opportunities for full immersion in the learning community. As members of the school faculty, with role descriptions appropriate to their levels of skills and knowledge, candidates share responsibility with PDS partners for the learning of P–12 students. Significant numbers of school faculty participate in candidates' preparation by serving as mentors, co-teachers, and colleagues in study groups, seminars, committees, and other professional,	Using a shared approach to candidate preparation, PDS partners include arts and sciences, professional education, and school faculty. Mechanisms are in place for PDS partners to share results and new knowledge with others in the extended learning community. All learners use their new knowledge to inform practice. Institutions and local and state entities use PDS generated knowledge to inform policies.

Element	*Beginning*	*Developing*	*At Standard*	*Leading*
		seminars, committees, and other professional, collegial activities. University faculty share their expertise, skills, and knowledge to support school improvement and candidate learning.	collegial activities. University faculty share their expertise, skills, and knowledge to support school improvement through direct and active participation in the PDS. University and school faculty share responsibility for P–12 student and candidate learning using a "whole-team" approach that includes family members. University faculty, school faculty, and candidates work as a team to support the learning of P–12 students.	
Work and Practice are Inquiry-Based and Focused on Learning.	The PDS participants articulate a shared goal of improving and assessing the learning of P–12 students, candidates, faculty, and other professionals. They express the belief that action research and other forms of inquiry are valuable tools in improving instruction.	Inquiry and action research are being used in some classrooms, but there may not be a clear conception of connections among the learning of P–12 students, candidates, and experienced educators. Some university and school faculty visit classrooms to observe each other's practice and to collect and share data; some use student outcome data to modify curriculum and instruction.	Practice in the PDS and partnering university is inquiry-based and an inquiry orientation weaves together learning, accountability, and faculty development. Inquiry is used routinely at an individual classroom, departmental, and school-wide level (at school and university) to inform decisions about which approaches to teaching and learning work best.	Sustained collaborative inquiry into improved learning for P–12 students is at the center of the partnership's vision and practices. Vehicles for sharing ideas and practices that have been successful in the PDS partnership are in place and are used to influence practice in the school district(s) and throughout the university (arts and sciences as well as professional education unit). The PDS participants share their inquiry-based learning experiences and results with audiences beyond the local PDS partnership.
Develop a Common Shared Professional Vision of Teaching & Learning Grounded in Research and Practitioner Knowledge.	PDS partners have a vision that includes an articulated set of beliefs about teaching and learning for P–12 students, candidates, and PDS partners. They have a plan to support P–12 student and professional learning in the context of practice.	PDS partners can articulate the partnership's vision and beliefs about learning in the context of practice for P–12 students, candidates, faculty, and other professionals. PDS partners can link some practices to their commonly-held beliefs. There are some examples of thoughtfully designed learning experiences and assessments based on these beliefs.	Because PDS partners believe that adults and children learn best in the context of practice, they develop and implement learning experiences and assessment processes that allow P–12 students, candidates, faculty, and other professionals to demonstrate what they know and are able to do. The learning experiences and assessment processes in the PDS reflect the most current research and the most advanced wisdom of practitioners.	Substantive conversations about teaching and learning infuse the PDS partnership. There is a process for reviewing and revising the shared vision as the knowledge base of the PDS partnership changes.

Element	*Beginning*	*Developing*	*At Standard*	*Leading*
Serve as Instrument of Change.	PDS partners envision the PDS as an instrument for school and university improvement. School district and university support the PDS partnership and its potential to provide exemplars of inquiry-based practice and to impel policy changes.	The PDS partnership has begun to realize its potential for changing school and university practice. Some members of each faculty have changed their instructional strategies, curriculum emphases, or research focuses as a result of their PDS activities. PDS partners are represented on each other's governing and policy boards.	Inquiry-based practice in the PDS sits at the intersection of professional education reform and school improvement. Because the professional preparation program and the school both view the PDS partnership as integral to their individual purposes, the PDS partnership leverages significant change. By integrating their expertise and knowledge of practice, PDS partners develop new approaches for examining and improving the practices of individuals and the policies of both institutions. Changes in policy and practice contemplated by PDS partner institutions are routinely filtered through the lens of the PDS partnership.	The PDS partnership produces outcome data that drive changes in how P–12 students, candidates, faculty, and other professionals learn. Partner institutions change policies and practices as a result of work done in PDSs. Multiple avenues for interaction with the profession, family members, and policymakers lead to policies and practices that reflect outcomes of PDS work. Intentional policies and practices at the institutional, local, and state level support PDS partnerships.
Extended Learning Community.	Although the relationship between the school and university may engage PDS partners in a limited fashion, there are plans for extending the learning community. There is a plan for creating a forum to share practices and policies with other PDSs in the partnership and affiliated schools.	PDS partners recognize the importance of extending the learning community to include family members, community members, arts and sciences faculty, and others. They have made efforts to involve at least one of these groups in their work. The PDS partnership has developed a forum for sharing practices and policies across PDSs and affiliated schools.	The PDS partnership includes multiple partner institutions and has established relationships with multiple schools. A process is in place to articulate, understand, and address the professional and cultural differences of the various institutional partners. The PDS participants include arts and sciences faculty,. family members, and members of the community.	The PDS partnership functions as an extended learning community for all participants, including arts and sciences faculty, family members, and other community, district, and university members. Structures exist for linking the policy-making groups of all partner institutions. Arts and sciences faculty are full partners in the PDS partnership, utilizing the professional education conceptual framework to guide teaching and learning practices for candidates. PDS partners engage family members in focusing on identifying students' needs. Family members are fully informed as stakeholders in PDS work.

Standard II: Accountability and Quality Assurance—Developmental Guidelines

PDS partners are accountable to themselves and to the public for upholding professional standards for teaching and learning. They define clear criteria at the institutional and individual levels for participation. PDS partners collaboratively develop assessments, collect information, and use results to systematically examine their practices and establish outcome goals for all P–12 students, candidates, faculty, and other professionals. The PDS partnership demonstrates impact at the local, state, and national level on policies and practices affecting its work.

Element	*Beginning*	*Developing*	*At Standard*	*Leading*
Criteria used to construct levels	*Beliefs, verbal commitments, plans, organization, and initial work are consistent with the mission of PDS partnerships.*	*The PDS partners pursue the mission of a PDS partnership with partial institutional support.*	***The mission of the PDS partnership is integrated into the partnering institutions. PDS work is expected and supported, and reflects what is known about the best practices.***	*Advanced PDS work is sustaining and generative, leading to:* *1. Systemic changes in policy and practice in the partner institutions.* *2. Impact on policy at the district, state, and national levels.*
Develop Professional Accountability.	PDS partners have a plan in place for the collaborative development and prioritization of important questions about P–12 student, candidate, faculty and other professionals' learning. They also have a plan in place for using local, state, and national standards for assessing all P–12 students, candidates, faculty and other professionals' learning.	PDS partners develop several important questions related to P–12 student, candidate, faculty, and other professionals' learning. Data are collected systematically to answer questions. Partners analyze data together and make some changes in practice as a result. PDS partners implement the plan for assessing P–12 student, candidate, faculty, and other professionals' learning based on local, state, and national standards.	PDS partners connect their questions about learning by P–12 students, candidates, faculty, and other professionals to the PDS's purposes and mission, and to the practices and beliefs of participants. Through the process of asking and answering questions, partners examine whether and how much the PDS partnership increases learning for all. A continuous process of assessment and evaluation based on local, state, and national standards is integrated into the PDS partnership, resulting in continual refinement of practices and increased professionalism. They use their analyses to make constructive changes at the individual, institutional, and partnership levels.	PDS partners use the outcomes of standards-based reviews to influence institutional policy. The PDS partner institutions play a leadership role in the larger community, shaping the discussion of changes in policies and practices.
Assure Public Accountability.	The school faculty report student achievement data to families and community. PDS partners explore ways to	PDS partners are engaged in reporting to the public about the knowledge, skills, and dispositions of P–12 students and candidates. A	PDS partners provide the public with evidence about what faculty, candidates, and P–12 students know and are able to do, and the values and commitments toward	PDS partner institutions provide leadership in shaping the discussion about public accountability. Families, community members,

Element	*Beginning*	*Developing*	*At Standard*	*Leading*
	collect and report evidence related to school and university faculty knowledge, skills, and dispositions. PDS partners discuss ways to engage families, policymakers, and the business community in shared responsibility for learning of P–12 students, candidates, faculty, and other professionals.	format for reporting evidence about faculty knowledge, skills, and dispositions is in place. The PDS participants include at least one of the following groups in shared responsibility for learning of P–12 students, candidates, faculty, and other professionals: families, policy makers, and/or the business community.	which PDS partners and candidates are disposed. The PDS partnership develops strategies for engaging families, policy makers, and the business community in sharing responsibility for the learning of P–12 students, candidates, faculty, and other professionals.	policymakers, and the business community are fully engaged with the PDS partnership.
Set PDS Participation Criteria.	PDS partners develop explicit criteria for PDS participants at the institutional and individual levels. The PDS partner institutions are accredited or planning for accreditation. PDS partners identify skills and knowledge for faculty and plan training. Partners discuss criteria for candidates' admission, program completion, and certification, and the relationship of these criteria to national standards.	By establishing clear and shared criteria for individuals and institutions, PDS partners underscore their commitment to making informed choices. PDS partners establish explicit, public criteria for recruiting and selecting PDS participants. Partner institutions are accredited or undertake a similar institutional review and use results. Most PDS partners participate in training for new roles. Partners are aligning criteria for candidates' admission, program completion, and certification with national standards.	The PDS partner institutions are accredited. Both demonstrate a capacity to use results to improve practice. The open and public process for recruiting and selecting PDS faculty and other professionals reflects the partners' shared beliefs about the skills and knowledge they value. PDS school faculty are licensed in the fields they teach and supervise. All PDS partners are experienced and recognized for their competence in their field. PDS partners participate in professional development activities to prepare for their new roles. As professionals, PDS partners develop criteria consistent with state and national standards for candidates' admission to and completion of the preparation program and make recommendations for candidate certification based on the standards.	The PDS partner institutions review criteria for individual and institutional partners, standards-based criteria for candidates' admission to and completion of the preparation program, and ongoing professional development for PDS partner roles on a regular basis. All PDS partners are licensed in the fields they teach or supervise and are master teachers and recognized for their competence in their field.
Develop Assessments, Collect Information, and Use Results.	School faculty collect some data about P–12 student achievement and examine the impact of current practices and norms on student learning. The PDS partners' primary focus is on evaluation of	PDS partners collect data from multiple sources and examine them systematically to identify the impact of individual teaching practices on P–12 student achievement. Partners are beginning to look at the impact of PDS programs and activities on student learning.	PDS partners develop the capacity to take knowledge-based action by regularly collecting information about the ways individuals' practices and institutional policies affect the achievement of P–12 students. The partners revise their teaching and learning approaches by testing new ideas and	The PDS partner institutions use the outcomes of continuous assessment, reflection, and actions as the lever for influencing public practices and policies related to professional education quality and student achievement.

Element	*Beginning*	*Developing*	*At Standard*	*Leading*
	candidate skills, knowledge, and dispositions in relationship to national standards. Candidate assessment is seen as the primary responsibility of university faculty, with some input from school faculty.	PDS partners have begun some informal assessments of faculty skills, knowledge, and dispositions. Candidate assessment is seen as a shared responsibility among partners, with a greater range of assessments in place or being planned.	questioning current norms and practices as they impact individual P–12 student achievement. As PDS partners systematically examine results related to how well, how much, and which P–12 students, candidates, faculty, and other professionals are learning, they begin a process of continuous assessment, reflection, and action that results in continuous improvement of learning for all PDS participants. They use multiple measures and multiple assessors to evaluate faculty and candidate skills, knowledge, and dispositions in relation to national, state, and unit standards.	
Engage with the PDS Context.	PDS partners have begun to explore the institutional and community supports and constraints to PDS work. Partners are aware of the need to engage with institutions and policymakers to influence policies.	PDS partners have a clear picture of the institutional and community supports and constraints to PDS work and have a plan for influencing institutional and community policies. PDS partner institutions have begun to develop inter-institutional relationships and connections with policymakers to influence policies and practices related to PDS work.	The PDS partnership is engaged in continual dialog with the school district, community, state, professional education unit, and the college/university regarding achievement of goals and impact of institutional/community supports and constraints on PDS work. As the PDS partnership continues to develop appropriate and consistent ways to provide all of its "publics" with evidence that participants are achieving their goals, the PDS partnership regularly examines the supports and constraints provided by the larger institutions and communities to which the PDS and the university are connected. The partners explicitly examine the congruence between the work of the PDS partnership and local, state, and national education policies.	The PDS partnership engages with other institutions and policymakers to influence policies and practices related to PDS work.

Standard III: Collaboration—Developmental Guidelines

PDS partners and partner institutions systematically move from independent to interdependent practice by committing themselves and committing to each other to engage in joint work focused on implementing the PDS mission. They collaboratively design roles and structures to support the PDS work and individual and institutional parity. PDS partners use their shared work to improve outcomes for P–12 students, candidates, faculty, and other professionals. The PDS partnership systematically recognizes and celebrates their joint work and the contributions of each partner.

Element	*Beginning*	*Developing*	*At Standard*	*Leading*
Criteria used to construct levels	*Beliefs, verbal commitments, plans, organization, and initial work are consistent with the mission of PDS partnerships.*	*The PDS partners pursue the mission of a PDS partnership with partial institutional support.*	***The mission of the PDS partnership is integrated into the partnering institutions. PDS work is expected and supported, and reflects what is known about the best practices.***	*Advanced PDS work is sustaining and generative, leading to:* *1. Systemic changes in policy and practice in the partner institutions.* *2. Impact on policy at the district, state, and national levels.*
Engage in Joint Work.	PDS partners collaboratively develop a plan for joint work that shapes the learning of candidates as well as P–12 students. The plan supports collaborative decision-making approaches and strategies to implement the work of the PDS. The plan also delineates shared institutional goals and leadership and resource commitments.	PDS partners collaborate on a variety of activities relating to candidate preparation, P–12 student learning, and structural change(e.g., time and resource allocation). In general, the partners jointly implement lower stakes decisions and practices , with evidence of isolated examples of higher-stakes joint decision-making efforts.	PDS partners use their shared work to improve outcomes for P–12 students, candidates, faculty, and other professionals. Deeper levels of collaboration blur the boundaries between and among partner institutions. Fully integrated decision making for the PDS partnership exists in areas that were formerly the sole domain of one of the partner institutions. PDS participants invite engagement with and critique from the broader education and policy communities. Arts and sciences, school, and university faculty together plan for and implement the candidates' curriculum and instruction. PDS partners select and prepare school and university faculty to mentor and supervise candidates. In response to the needs demonstrated by P–12 students, PDS partners collaboratively design staff development initiatives and	Collaboration expands the sphere of the partnership to include others in the university and community. The deeper involvement of district, union or professional education association, university, and community members allows for the spread of ideas to the broader sphere. Partners are engaged in simultaneous and mutual renewal and are willing and able to challenge one another on policies that might get in the way.

Element	*Beginning*	*Developing*	*At Standard*	*Leading*
			undertake improvement-oriented inquiries. The PDS partners set standards for participation and learning outcomes together. The PDS partnership involves families.	
Design Roles and Structures to Enhance Collaboration and Develop Parity.	The development of new roles and the necessary reallocation of resources are discussed and agreed to by the PDS participants. PDS participants agree to operate the PDS in ways that recognize and encourage parity among the partners.	New roles for PDS participants are evident for some members. There is evidence of parity in some of the decision-making processes and resource allocations.	Norms, roles, structures, and resource allocations in the PDS partnership reflect the PDS partner institutions' commitment to parity. PDS partnership committees include representatives from constituent groups and clearly define the expectations and responsibilities of partner institutions. The PDS partnership designs structures, including reward structures, to support collaboration among PDS partners, within the partnering institutions, and among the extended learning communities.	Long-term shifts of culture and norms are woven into the partner institutions, including roles and mutual expectations and commitments of participants. All PDS partner institutions are committed to the renewal and improvement of schools and teacher education. PDS partner institutions engage district and state policymakers to allocate additional resources for PDS partners and support changes in roles and structures at institutional levels.
Systematically Recognize and Celebrate Joint Work and Contributions of Each Partner.	Joint work in the PDS is expressed as a value of the PDS participants and institutional leaders.	PDS partner institutions respect and value the beliefs, needs, and goals of all participants. Partners depend on each other to accomplish some of their professional goals.	PDS partner institutions maintain the norm of joint and collaborative work. Appreciating, valuing, and celebrating PDS work by all members of the partnership is an important part of the culture and reward structure.	Appreciating, valuing, and celebrating PDS work by all PDS partner institutions is a routine and widespread part of the culture and reward structure. District and state policymakers recognize and reward PDS work.

Standard IV: Diversity and Equity—Developmental Guidelines

PDS partners and candidates develop and demonstrate knowledge, skills, and dispositions resulting in learning for all P–12 students. PDS partners ensure that the policies and practices of the PDS partner institutions result in equitable learning outcomes for all PDS participants. PDS partners include diverse participants and diverse learning communities for PDS work.

Element	*Beginning*	*Developing*	***At Standard***	*Leading*
Criteria used to construct levels	*Beliefs, verbal commitments, plans, organization, and initial work are consistent with the mission of PDS partnerships.*	*The PDS partners pursue the mission of a PDS partnership with partial institutional support.*	***The mission of the PDS partnership is integrated into the partnering institutions. PDS work is expected and supported, and reflects what is known about the best practices.***	*Advanced PDS work is sustaining and generative, leading to:* *1. Systemic changes in policy and practice in the partner institutions.* *2. Impact on policy at the district, state, and national levels.*
Ensure Equitable Opportunities to Learn.	PDS partners and candidates examine the gaps in achievement among racial groups. PDS partners and candidates examine the curricula of the university and school programs in light of issues of equity and access to knowledge by diverse learners. PDS partners begin to expand their curricula to include multicultural and global perspectives. PDS partners and candidates begin to engage in learning experiences that allow them to develop the proficiencies to support P–12 students with exceptionalities and those from diverse groups including ethnic, racial, gender, and socioeconomic groups.	PDS partners and candidates develop systems to use information to address the gaps in achievement among racial groups. The curricula in the university and school programs reflect issues of equity and access to knowledge by diverse learners. PDS partners and candidates begin to teach from multicultural and global perspectives that draw on the histories, experiences, and diverse cultural backgrounds of all people. PDS partners and candidates implement strategies to support P–12 students with exceptionalities and those from diverse groups including ethnic, racial, gender, and socioeconomic groups. Familial aspirations for children broaden the PDS's understanding of multiple measures of student success.	PDS partners and candidates systematically analyze data to address the gaps in achievement among racial groups. PDS partners implement curricula in the university and school programs that reflect issues of equity and access to knowledge by diverse learners. PDS partners and candidates are able to teach from multicultural and global perspectives that draw on the histories, experiences, and diverse cultural backgrounds of all people. By integrating the aspirations identified by P–12 students and families, PDS partners and candidates increase their capacity to support P–12 students with exceptionalities and those from diverse groups including ethnic, racial, gender, and socioeconomic groups.	PDS partners present data to the professional and policymaking community showing the ways in which they have decreased the gaps in achievement among racial groups. PDS partner institutions create mechanisms to disseminate curricula in the university and school programs that reflect issues of equity and access to knowledge by diverse learners. PDS partners model for the professional community the ways in which they teach from multicultural and global perspectives that draw on the histories, experiences, and diverse cultural backgrounds of all people. PDS partners share their knowledge with the professional community about integrating familial aspirations for P–12 students. They demonstrate to colleagues and the community the ways in which they support P–12 students with exceptionalities and those from diverse groups including ethnic, racial,

Element	*Beginning*	*Developing*	*At Standard*	*Leading*
	PDS partners consider family aspirations in the goal setting for P–12 students.			gender, and socioeconomic groups.
Evaluate Policies and Practices to Support Equitable Learning Outcomes.	School and university PDS partners recognize that their curricula, instructional approaches, and assessment strategies affect outcomes for diverse P–12 students and candidates. PDS partners examine multiple and varied assessment approaches to measure learning in the PDS. PDS partners engage families and community in support of P–12 student learning	PDS partnership agreement specifies processes to evaluate the extent to which the PDS partner institutions provide equitable learning opportunities and outcomes, and the ways in which they use results. The PDS partner institutions develop systems to examine how their curricula, instructional approaches, and assessment strategies affect outcomes for diverse P–12 students and candidates. PDS partners use multiple and varied assessment approaches to measure learning in the PDS and university partner. PDS partners develop additional strategies to engage families and community in support of P–12 student learning.	The PDS partnership implements processes to evaluate the extent to which the PDS partner institutions provide equitable learning opportunities and outcomes. Partner institutions evaluate their processes for using results. The PDS partners systematically examine how their curricula, instructional approaches, and assessment strategies affect outcomes for diverse P–12 students and candidates. PDS partners use multiple and varied assessment approaches to measure learning in the PDS. P–12 students and candidates with diverse learning needs show continuing achievement gains. PDS partners engage increasing numbers of families and community members in support of P–12 student learning.	PDS partners use a shared family-student - faculty-candidate approach to set goals for P–12 students and to examine results collaboratively. P–12 student and candidate results indicate that the PDS partnership significantly reduces historic achievement gaps. The PDS partner institutions demonstrate to colleagues and the community how they evaluate the connections between the outcomes achieved by diverse P–12 students and candidates and the curricula, instructional approaches, and assessment strategies used in the PDS and university.
Recruit and Support Diverse Participants.	The PDS partner institutions begin to develop practices and policies to recruit diverse candidates, faculty and other professionals to engage in PDS work. PDS partners examine the opportunities they provide for candidates, faculty, and other professionals to develop and demonstrate their capacity to work well with diverse learners and their families.	The PDS partner institutions implement practices and policies to recruit diverse candidates, faculty, and other professionals to engage in PDS work. The PDS partner institutions begin to develop an array of academic, financial, and social support mechanisms to increase candidates' success. PDS partners seek to expand the partnership by initiating discussions with new PDSs or affiliated schools in diverse communities.	The PDS partner institutions uphold practices and policies to recruit diverse candidates, faculty, and other professionals to engage in PDS work. The PDS partner institutions provide candidates with an array of academic, financial, and social support mechanisms to increase their success. Candidates and PDS partners develop and demonstrate their capacity to work well with diverse learners and their families at partnership sites. The PDS partnership includes PDSs or affiliated schools in diverse communities.	At each PDS and across the PDS partner institutions the partners examine the results of their practices and policies aimed at the recruitment and support of diverse candidates, faculty, and other professionals. Using these results, PDS partners refine their approaches to recruitment and support. PDS partners demonstrate to colleagues and the professional and policy community those practices and policies that increase the capacity of candidates and faculty to work well with diverse learners and their families.

Standard V: Structures, Resources, and Roles—Developmental Guidelines

The PDS partnership uses its authority and resources to articulate its mission and establish governing structures that support the learning and development of P–12 students, candidates, faculty, and other professionals. The partner institutions ensure that structures, programs, and resource decisions support the partnership's mission. They create new roles and modify existing roles for P–12 students, candidates, faculty, and other professionals, to achieve the PDS mission. The partnership effectively uses communication for coordination and linkage with the school district, university, and other constituencies and to inform the public, policy makers, and professional audiences of its work.

Element	*Beginning*	*Developing*	*At Standard*	*Leading*
Criteria used to construct levels	*Beliefs, verbal commitments, plans, organization, and initial work are consistent with the mission of PDS partnerships.*	*The PDS partners pursue the mission of a PDS partnership with partial institutional support.*	***The mission of the PDS partnership is integrated into the partnering institutions. PDS work is expected and supported, and reflects what is known about the best practices.***	***Advanced PDS work is sustaining and generative, leading to:*** ***1. Systemic changes in policy and practice in the partner institutions.*** ***2. Impact on policy at the district, university, and state levels.***
Establish Governance and Support Structures.	The PDS partner institutions agree to form a professional development school and to develop a joint mission statement. Institutional leaders participate in early discussions and decisions about PDS work.	PDS partner institutions enter into a written agreement that commits the school district, the teacher union or professional education association, and the university to the mission and support of the PDS partnership. The PDS partnership establishes a governing council that represents all PDS partner institutions. The council meets to plan, implement, and monitor the PDS partnership's effectiveness. Institutional leaders demonstrate their commitment to PDS work. Leaders use their positional authority to inform all critical constituencies about PDS work	The PDS partnership is integral to the operation of both the school and the university; the PDS is used in job descriptions, course catalogs, integrated into core values, culture and, in general, is "woven into the fabric" of the partner institutions. A critical mass of participants—both within and across the partner institutions—are engaged in the PDS partnership, including those in leadership and authority positions. The governing council meets regularly and engages a range of faculty, staff, and administrators from partner institutions in systematic oversight of collaborative work. The work, governance, and support structures of the PDS partnership include arts and sciences faculty, as well as family	PDS participants help create and support an advocacy organization to represent the PDS partnership in local, state, and national arenas. This PDS advocacy organization includes family, community groups, business groups, educational agencies, and lobbyists. The organization lobbies at local, state, and national levels for changes in school and teacher education policy based on research and experiences developed from the use of best practices. PDS partnership governance is smoothly integrated with the governance structures of each partner institution in ways that reflect long-range and stable revenue streams, as well as the simultaneous and mutual renewal of partner institutions. Institutional mechanisms provide the structural support necessary to sustain a culture in which change is normative.

Element	*Beginning*	*Developing*	*At Standard*	*Leading*
			and community groups.	Institutional leaders play significant advocacy roles.
Ensure Progress Towards Goals.	PDS partners articulate partnership goals that tie in to local needs and are consistent with the mission of PDSs. The PDS partners agree to place P–12 students' needs at the center of PDS work.	Understanding of the PDS partnership mission spreads to an increasing number of participants. PDS partners conduct some research to assess effectiveness of the PDS partnership, and to evaluate future needs.	The PDS partner institutions implement a process to evaluate needs and effectiveness in light of the PDS partnership's mission.	The PDS partner institutions have established mechanisms for regular review of progress toward initial and developing goals of the PDS partnership, with particular emphasis on the impact of the PDS on P–12 student learning.
Create PDS Roles.	New roles emerge in the PDS partner institutions for those involved in PDS work. PDS partners plan professional development opportunities for faculty and other professionals to develop leadership, inquiry, and other boundary-spanning skills.	A growing number of individuals are engaged in PDS work, although PDS work is often in addition to their regular duties. There is evidence of some training and support. PDS partners have a growing understanding of the complexities of their partnership and the boundary spanning issues that arise.	The PDS partner institutions create and modify existing roles, moving beyond traditional roles and institutional borders to support the PDS mission. Partner institutions encourage, develop, and support boundary-spanning roles. The partner institutions establish job descriptions that include qualifications for entry, performance criteria, and processes for entry and exit. PDS-related work is woven into the regular job descriptions of PDS partners, and is not an "add-on." Participants in these new roles are prepared and supported in them through a range of professional development activities. The reward system, including salaries, incentives, promotion, and tenure, at partner institutions reflects the importance of PDS work.	A mechanism exists to allow for the creation and support of new roles in all PDS partner institutions. Local, state, and national policymakers provide additional financial support for new PDS partnership roles.
Resources.	Partner institutions identify kinds of resources needed to support PDS work.	Partner institutions commit time and other resources to the PDS, but these commitments often rely upon grant funding and/or donated time of PDS partners.	Partner institutions garner and allocate resources to support PDS work. As part of their institutional commitment to the PDS partnership, the partner institutions provide participants with specific resources including time, space, incentives, professional expertise, leadership, vision, technology, public relations, and access to	Partners secure sustained resource support for PDS work from local, state, and national sources.

Element	*Beginning*	*Developing*	*At Standard*	*Leading*
			community partners to advance the PDS work. PDS partners develop and monitor an annual budget that commits shared resources to the PDS. Adequate resources are available, including budget lines at partner institutions that permit PDS partners to do PDS work during their regular work day.	
Use Effective Communication.	PDS participants see communication as a key goal. They recognize the importance of clear communication mechanisms.	There is evidence of attention to creating effective communication in the PDS partnership among partners and other participants	PDS partner institutions create communication links with the broader school district and university communities. Partners institutions receive and exchange information about PDS work plans, resources, and structures.	Communication mechanisms are in place to disseminate information to various stakeholders within the PDS partnership and to other constituent groups, especially to those who participate in the advocacy organization.

Standard I: Learning Community

The PDS is a learning-centered community that supports the integrated learning and development of P-12 students, candidates, and PDS partners through inquiry-based practice. PDS partners share a common vision of teaching and learning grounded in research and practitioner knowledge. They believe that adults and children learn best in the context of practice. Learning supported by this community results in change and improvement in individual practice and in the policies and practices of the partnering institutions.

The PDS partnership includes principal and supporting institutions and individuals. The principal PDS partners are members of the P-12 schools and professional preparation programs who agree to collaborate. The supporting PDS partner institutions include the university, the school district, and the teacher union or professional education association(s). Arts and sciences faculty, other interested school and university faculty, family members, community members, and other affiliated schools are important PDS participants in the extended learning community.

Elements	Evidence	Conclusions
Support Multiple Learners		
Work and Practice are Inquiry-Based and Focused on Learning		
Develop a Common Shared Professional Vision of Teaching and Learning Grounded in Research and Practitioner Knowledge		
Serve as Instrument of Change		
Extended Learning Community		

Standard II: Accountability and Quality Assurance

PDS partners are accountable to themselves and to the public for upholding professional standards for teaching and learning. They define clear criteria at the institutional and individual levels for participation. PDS partners collaboratively develop assessments, collect information, and use results to systematically examine their practices and establish outcome goals for all P-12 students, candidates, faculty, and other professionals. The PDS partnership demonstrates impact at the local, state, and national levels on polices and practices affecting its work.

Elements	Evidence	Conclusions
Develop Professional Accountability		
Assure Public Accountability		
Set PDS Participation Criteria		
Develop Assessments, Collect Information, and Use Results		
Engage with the PDS Context		

Standard III: Collaboration

PDS partners and partner institutions systematically move from independent to interdependent practice by committing themselves and making a commitment to each other to engage in joint work focused on implementing the PDS mission. They collaboratively design roles and structures to support the PDS work and individual and institutional parity. PDS partners use their shared work to improve outcomes for P-12 students, candidates, faculty, and other professionals. The PDS partnership systematically recognizes and celebrates their joint work and the contributions of each partner.

Elements	Evidence	Conclusions
Engage in Joint Work		
Design Roles and Structures to Enhance Collaboration and Develop Parity		
Systematically Recognize and Celebrate Joint Work and Contributions of Each Partner		

Standard IV: Diversity and Equity

PDS partners and candidates develop and demonstrate knowledge, skills, and dispositions resulting in learning for all P-12 students. PDS partners ensure that the policies and practices of the PDS partner institutions result in equitable learning outcomes for all PDS participants. PDS partners include diverse participants and diverse learning communities for PDS work.

Elements	Evidence	Conclusions
Ensure Equitable Opportunities to Learn		
Evaluate Policies and Practices to Support Equitable Learning Outcomes		
Recruit and Support Diverse Participants		

Standard V: Structures, Resources, and Roles

The PDS partnership uses its authority and resources to articulate its mission and establish governing structures that support the learning and development of P-12 students, candidates, faculty, and other professionals. The partner institutions ensure that structures, programs, and resource decisions support the partnership's mission. They create new roles and modify existing roles for P-12 students, candidates, faculty, and other professionals to achieve the PDS mission. The partnership effectively uses communication for coordination and linkage with the school district, university, and other constituencies and to inform the public, policy makers, and professional audiences of its work.

Elements	Evidence	Conclusions
Establish Governance and Support Structures		
Ensure Progress Towards Goals		
Create PDS Roles		
Resources		
Use Effective Communication		

APPENDIX C:
GUIDING QUESTIONS
FOR SELF-STUDIES
AND
VISIT TEAM MEMBERS

GUIDING QUESTIONS FOR SELF-STUDIES AND VISIT TEAMS

Members of the partnership steering committee as well as those on the visit team need to make observations, conduct interviews, and review documents to gather information related to the PDS Standards. The following questions are designed to provide guidance in that process.

Learning Community

1. What is the PDS's vision of teaching and learning? Is this vision shared? How do you know? How was it developed?
2. What does student learning look like in PDS classrooms? What are P–12 students doing? How do they spend their time?
3. How does the partnership provide opportunities for teacher candidates and faculty to develop their skills and knowledge in working with diverse students?
4. How do they use what they learn to improve the organizational environment and to improve practice?
5. How are teacher candidate and faculty learning embedded into the school program and into practice?
6. How do professionals work together? How do they disseminate ideas and approaches they have developed to their school and university partners?

Possible sources of evidence might be: interviews with candidates, faculty, P–12 students; shadowing of candidates and faculty; seminar agenda and participant notes; notes of meetings and seminars; structures and forums for dissemination of knowledge.

Actual evidence might include: names of faculty engaged in reflective practices (e.g., action research, study groups, critical friends groups) and samples of their work; a plan for and records of actions taken to share work with colleagues within school and with other schools; activities that include the children's families as learners; data collected systematically on teaching and learning and made available to everybody.

Accountability and Quality Assurance

1. What feedback and assessment mechanisms do participants use to gather information about
   a) P–12 students' learning and growth?
   b) teacher candidates' learning and growth?
   c) growth of school- and university-based faculties?
2. How do PDS participants use inquiry to transform day-to-day teaching and learning practices? (e.g., What evidence exists for inquiry-based instruction? How do participants use inquiry to legitimize practice?)
3. What kinds of inquiries do participants conduct to examine and measure the effects of their efforts?
4. How do participants use information to make program changes?

5. What standards or frameworks does the PDS use to make curricular, instructional, and assessment decisions at the school and university?

6. How is the clinical program for teacher candidates assessed?

Possible sources of evidence might be: assessment tools; statements of standards used; documents with requirements for entry and exit of teacher candidates; portfolios; meeting records of decisions made.

Actual evidence might include: entry requirements for teacher candidates are used to determine who is selected to participate in the program; mentor teacher requirements are known and used for selection; expectations for teacher candidate knowledge and skill are known and there are multiple ways of assessing the skills during and before exit from the clinical program including: observation formats that include feedback and indications of acceptable levels of performance; paper and pencil tests; review documents summarizing teacher candidate performance; portfolios of teacher candidate and student work.

Collaboration

1. How and by whom are important decisions made?

2. In what ways do participants feel a sense of "equivalence?" Do they have parity in the PDS? How do you know?

3. How deep is this PDS—what are the participation rates of school- and university-based faculty?

4. In what ways have participants created deep interpersonal connections both within and across institutional boundaries?

5. What have been the easiest areas for collaboration? What are the most difficult?

6. Is there a process to ensure collaboration in any (or all) initiatives?

Possible sources of evidence might be: records of meetings; role descriptions of faculty in school and university; records of teaching assignments, conferences.

Actual evidence might include: process for decision-making used, who carries out what work, what work is jointly discussed, the process for sharing expertise, what decisions are jointly made.

Diversity and Equity

1. What programs, practices, or policies at the school and university reflect the PDS's concerns for equity?

2. How are the needs of diverse learners met?

3. How does the PDS site/PDS partnership ensure access for all learners?

4. Are the assessment strategies used appropriate and diverse?

5. Is the curriculum for students, teacher candidates, and experienced faculty inclusive?

6. How has the issue of equity affected the work of school- and university-based teachers, administrators, teacher candidates, and P–12 students?

7. How do participants demonstrate that their practices are effective with respect to ensuring equity?

Possible sources of evidence might be: classroom assignments of teachers and teacher candidates; PDS research agenda; curriculum for teacher candidates; listing of professional development offerings.

Actual evidence might include: teacher candidates, work with P–12 students with diverse learning needs; the research agenda includes equity questions; the curriculum for school and university partners reflects diversity and is non-discriminatory; professional development opportunities address meeting the needs of the entire learning community; evidence of using assessment strategies that are appropriate and diverse; curriculum for P–12 students, teacher candidates, and experienced faculty are inclusive.

Structures, Resources, and Roles

1. What is the context in which the PDS lives?

2. Which school and university structures, practices, and policies affect PDS practices and outcomes (e.g., the ways in which rewards are provided; the ways in which resources are allocated)?

3. If this is a multiple school partnership, how do participants engage with each other? How do they benefit from these connections?

4. What kinds of organization, roles, and structures have been introduced to support PDS work?

5. What are the issues relevant to creating new roles, organization, and structures for the PDS?

Possible sources of evidence might be: budgets; memos of understanding; union agreement; PDS role descriptions; schedules; calendars.

Actual evidence might include: schedules for faculty and teacher candidates that reflect their PDS roles and responsibilities; calendar for teacher candidates that reflects the school needs; PDS roles are acknowledged in job positions, evaluations, and tenure decisions; teacher candidates are acknowledged as members of school faculty in all rituals and procedures, e.g., included in memos, have mailboxes, parking spaces; data are collected and used to inform decision-making; university and school resources are blended to support PDS work; presence of cohort of teacher candidates makes other PDS work possible, i.e., providing professional time for teacher research, curriculum development, meeting with community and families; working with individual P–12 students and small groups.

APPENDIX: D
TEMPLATES FOR SELF-STUDY REPORTS
AND
VISIT REPORTS

TEMPLATE FOR SINGLE-SCHOOL SELF-STUDY REPORT

A typical self-study report has the following sections:

I. Introduction (2-3 pages)

Part A: Brief Description of Partnership Context

- Location
- Key factors in formation of the PDS partnership
- If there is a multiple school partnership, how does this PDS relate to the other PDSs in the partnership
- Governing body
- Size
- Grade levels included
- Demographics of P–12 students, candidates, and community
- Achievement data for P–12 students in PDSs
- Achievement data for candidates in the PDSs

Part B: Overview of Self-Study Process

- How the Partnership Steering Committee was formed
- PSC membership
- How preliminary findings were shared with the partnership constituencies
- Any limitations or additional notes on the self-study process

II. The Work of the Partnership

A. The strand(s) of work described as the initial focus of the self-study

B. How the four functions of a PDS are represented in the work described

C. How P–12 student learning is central to the work of the PDS and drives the adult learning

III. Conclusions, Statements of Standing, and Recommendations

The findings are organized by standard, using this format:

A. Conclusions

Standard I: Learning Community

1. Element: Support Multiple Learners
   - conclusion(s)/evidence
2. Element: Work and Practice are Inquiry-Based and Focused on Learning
   - conclusion(s)/evidence

3. Element: Develop a Common Shared Professional Vision of Teaching and Learning Grounded in Research and Practitioner Knowledge
    - conclusion(s)/evidence
4. Element: Serve as Instrument of Change
    - conclusion(s)/evidence
5. Element: Extended Learning Community
    - conclusion(s)/evidence

B. Statement of Standing on Learning Community

- Holistic view that determines the partnership's developmental stage

C. Recommendations

- Suggestions to help the partnership move to next stage on guidelines may be specific at the element level.

(This format is repeated for each standard.)

IV. Summary: Connections Between the Self-Study and Follow-up Plans

- Plans for follow-up activity based on the self-study.
- Key questions to guide follow-up work or a visit

TEMPLATE FOR MULTIPLE SCHOOL PDS PARTNERSHIP SELF-ASSESSMENT REPORT

I. Introduction (2-3 pages)

Part A. Brief Description of Partnership Context

- Location
- Key factors in formation of the MSPDS partnership, including history and growth
- Governing body
- Size
- Grade levels/schools included
- Demographics of school and university partners: P-12 students, candidates, faculty, community
- Achievement data for P-12 students
- Achievement data for candidates

Part B. Overview of Self-Assessment Process

- How the Partnership Steering Committee (PSC) was formed
- PSC membership
- How preliminary findings were shared with MSPDS partnership constituencies
- Limitations on the self-assessment process

II. The Work of the MSPDS Partnership

- Strands of work shared across the MSPDS partnership
- How the functions of a PDS are represented in the work described
- How P-12 student learning is central to the shared work

III. Conclusions and Recommendations

(Note: Evidence is drawn from individual self-studies and from sources relevant to the MSPDS partnership specifically. One or more conclusions are drawn at the element level with evidence cited for each conclusion)

A. Conclusions

Standard I. Learning Community

1. Element: Support Multiple Learners
   - Conclusions/Evidence
2. Element: Work and Practice are Inquiry-Based and Focused on Learning
   - Conclusions/Evidence
3. Element: Develop a Common Shared Professional Vision of Teaching and Learning Grounded in Research and Practitioner Knowledge
   - Conclusions/Evidence

4. Element: Serve as Instrument of Change
    - Conclusions/Evidence
5. Element: Extended Learning Community
    - Conclusions/Evidence

B. Recommendations Standard I. Learning Community

- Suggestions to help MSPDS partnership move on to the next stage on guidlines. May be specific at the element level.

(This format should be repeated for each standard)

IV. Summary: Connections between the Self-Study and Follow-up Plans

- Plans for follow-up activity based on the self-study.
- Key questions to guide follow-up work or a visit

REPORT TEMPLATE
COVER PAGE

(NAME OF THE PDS PARTNERSHIP VISITED)

A Report to the Partnership Prepared by the Visiting Team

(List the Names and Affiliations of the Visiting Team)

DATE

COVER LETTER TO PARTNERSHIP

(Prepared by Visit Team Chair.)

Date

Dear _____:

On behalf of the visit team, we thank you for your work and efforts to insure that the visit went well.

We are pleased to send this report to you and _____ partnership on behalf of the [agency] visit team. The team trusts that this report will be helpful to the work of the partnership.

The visit team report is considered the property of your PDS partnership. It is based on a collegial visit and serves no official function.

Sincerely,

Visit Team Chair

VISIT TEAM REPORT TEMPLATE

I. Context of the Partnership and the Visit

A. Profile of the Partnership

(This section may be simply transferred or summarized from the partnership's self-study)

1. Location
2. Key factors in formation of the PDS partnership
3. If there is a multiple school partnership, how does this PDS relate to the other PDSs in the partnership?
4. Governing body
5. Size
6. Grade levels included
7. Demographics of P–12 students, candidates, and community
8. Achievement data for P–12 students in PDSs
9. Achievement data for candidates in the PDSs
10. Major issues of development (if any) that are underway.

B. Overview of Visit Process and the Nature of this Report

1. How the visit team was formed
2. Visit team membership
3. Based on a visit on _____
4. How information was collected: including the activities team members engaged in, for example:
   a) Sites visited
   b) Number of students followed
   c) Work examined
   d) Teacher candidates shadowed
   e) Classes observed
   f) Discussions with PDS partnership members held, etc.
5. How conclusions were reached: how the team used evidence, team discussion and consensus.

C. Limitations and Uses of the Report

1. Limitations: General limitations including e.g., short time frame of visit, number of visitors. Special circumstances that might have affected the visit e.g., illness, unavailability of key participants, or external events that might make the snapshot of the partnership atypical or not fully representative.
2. Uses: The report belongs to the partnership and will not be used without partnership permission.

II. Conclusions, Statement of Standing, and Recommendations

This section forms the body of the Report and focuses on each of the five PDS Standards:

Standard 1: Learning Community

Standard 2: Accountability and Quality Assurance

Standard 3: Collaboration

Standard 4: Equity and Diversity

Standard 5: Structures, Resources, and Roles

For each Standard, the following format is used:

A. Conclusion

Standard I: Learning Community

1. Element: Support Multiple Learners
   - conclusion(s) evidence
2. Element: Work and Practice are Inquiry-Based and Focused on Learning
   - conclusion(s) evidence
3. Element: Develop a Common Shared Professional Vision of Teaching and Learning Grounded in Research and Practitioner Knowledge
   - conclusion(s) evidence
4. Element: Serve as Instrument of Change
   - conclusion(s) evidence
5. Element: Extended Learning Community
   - conclusion(s) evidenceStatement of Standing on Learning Community

B. Statement of Standing on Learning Community
Holistic statement that reflects team's view of the partnership's developmental stage for that standard

C. Recommendations

Suggestions to help the partnership move to next stage on guidelines

(May be specific to the element level.)

(This format should be repeated for each standard.)

III. Summary and Reflections

Final reflections on the partnership by the visit team, making connections to the big picture of what is most important to PDS work.

TEMPLATE FOR MULTIPLE SCHOOL PDS PARTNERSHIP VISIT REPORT

I. Context of the Partnership and the Visit

A. Profile of the multiple school PDS partnership context

1. Brief description of partnership context
2. Location
3. Key factors in formation of the MSPDS partnership, including the history and growth
4. Governing body
5. Size
6. Grade levels/schools included
7. Demographics of school and university partners: P-12 students, candidates, faculty, community
8. Achievement data for P-12 students
9. Achievement data for candidates

B. Overview of the Self-Assessment Process

1. How the MSPDS Partnership Steering Committee was formed
2. PSC membership
3. How single site self studies were shared with MSPDS Partnership Steering Committee
4. How conclusions and recommendations were developed using single-site self studies and other data
5. How preliminary findings were shared with MSPDS partnership constituencies.

C. Overview of the Visit Process

1. How the visit team was formed
2. Visit team membership
3. How information was collected including the activities team members engaged in. For example:
   a) sites visited, including identification of the focal site for the visit
   b) number of students followed
   c) work examined
   d) teacher candidates shadowed
   e) classes observed
   f) discussions with PDS partnership members held including cross-site MSPDS partnership meetings, activities, focus groups etc.
4. How conclusions were reached. How the team used evidence.

D. Limitations and Uses of the Report

1. Limitations: General limitations including e.g., short time frame of visit, number of visitors. Special circumstances that might have affected the visit e.g., illness, unavailability of key participants, or external events that might make the snapshot of the partnership atypical or not fully representative.
2. Uses: The report belongs to the partnership and will not be used without partnership permission.

II. Conclusions and Recommendations

(Note: Conclusions pertain to the MSPDS partnership only, and not to any one of the constituent PDSs. Evidence may be drawn from individual self-studies, and anchor-site visits, and from sources relevant to the MSPDS partnership. One or more conclusions are drawn at the element level, with evidence cited for each conclusion.)

A. Conclusions

Standard I. Learning Community

1. Element: Support Multiple Learners
   - conclusion(s)/evidence
2. Element: Work and Practice are Inquiry-Based and Focused on Learning
   - conclusion(s)/evidence
3. Element: Develop a Common Shared Professional Vision of Teaching and Learning Grounded in Research and Practitioner Knowledge
   - conclusion(s)/evidence
4. Element: Serve as Instrument of Change
   - conclusion(s)/evidence
5. Element: Extended Learning Community
   - conclusion(s)/evidence

B. Recommendations

Standard I. Learning Community

1. Suggestions to help MSPDS Partnership move to next stage on guidelines

   (May be specific at the element level.)

(This process should be repeated for each standard)

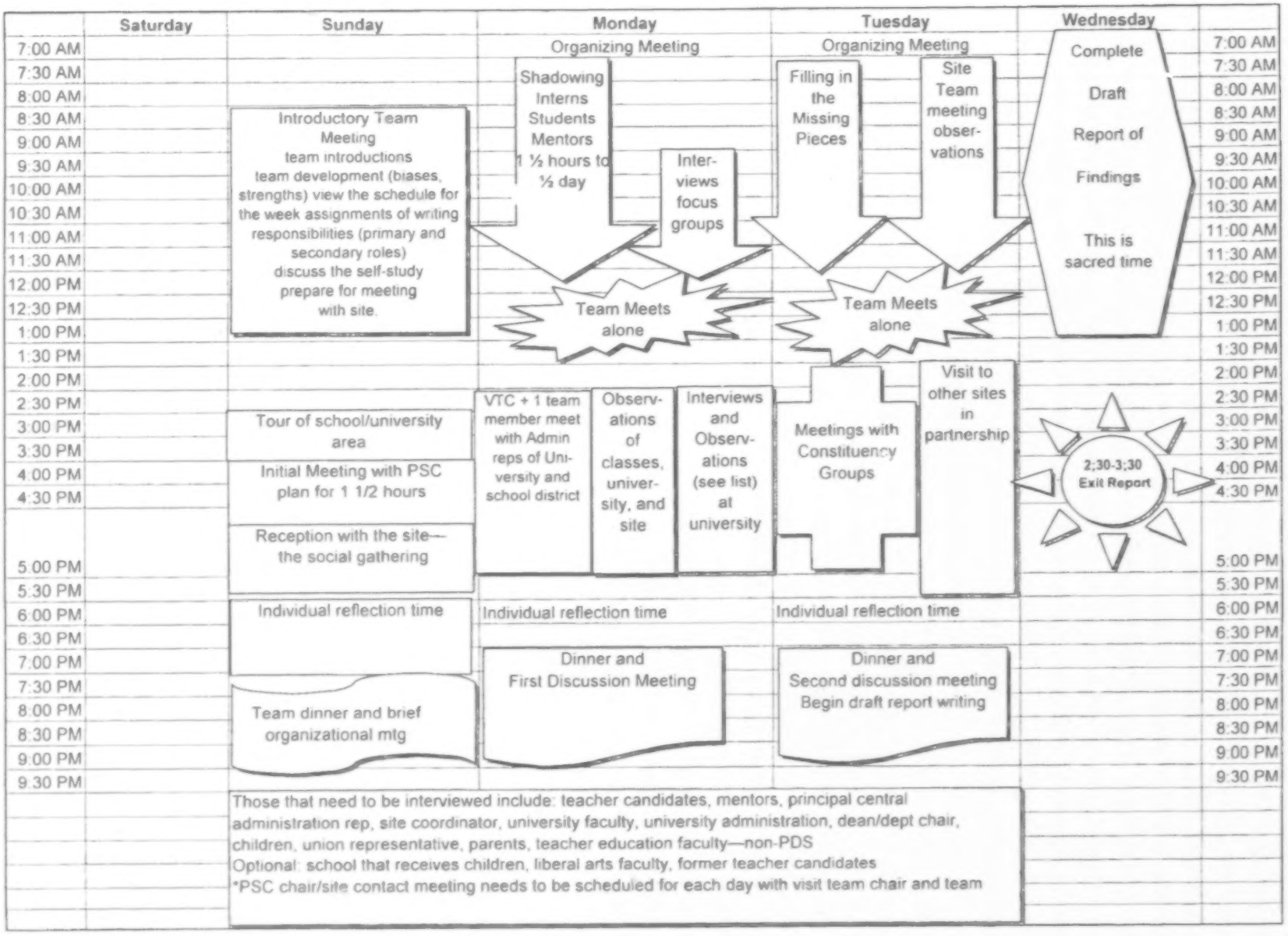
III. SUMMARY AND REFLECTIONS

Final reflections on the partnership by the visit team, making connections to the big picture of what is most important to PDS work.

APPENDIX E:

SCHEMATIC OF PDS PARTNERSHIP SITE VISIT SCHEDULE

SCHEMATIC OF PDS PARTNERSHIP SITE VISIT SCHEDULE


Saturday
Sunday
Monday
Tuesday
Wednesday
7:00 AM
7:30 AM
8:00 AM
8:30 AM
9:00 AM
9:30 AM
10:00 AM
10:30 AM
11:00 AM
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9:30 PM
Organizing Meeting
Organizing Meeting
Introductory Team Meeting
team introductions
team development (biases, strengths) view the schedule for the week assignments of writing responsibilities (primary and secondary roles)
discuss the self-study
prepare for meeting with site.
Shadowing Interns Students Mentors
1 ½ hours to ½ day
Inter-views focus groups
Filling in the Missing Pieces
Site Team meeting obser-vations
Complete Draft Report of Findings
This is sacred time
Team Meets alone
Team Meets alone
Tour of school/university area
Initial Meeting with PSC plan for 1 1/2 hours
Reception with the site—the social gathering
VTC + 1 team member meet with Admin reps of Uni-versity and school district
Observ-ations of classes, univer-sity, and site
Interviews and Observ-ations (see list) at university
Meetings with Constituency Groups
Visit to other sites in partnership
2:30-3:30 Exit Report
Individual reflection time
Individual reflection time
Individual reflection time
Team dinner and brief organizational mtg
Dinner and First Discussion Meeting
Dinner and Second discussion meeting Begin draft report writing
Those that need to be interviewed include: teacher candidates, mentors, principal central administration rep, site coordinator, university faculty, university administration, dean/dept chair, children, union representative, parents, teacher education faculty—non-PDS
Optional: school that receives children, liberal arts faculty, former teacher candidates
*PSC chair/site contact meeting needs to be scheduled for each day with visit team chair and team

Note: Review of documents is on-going
Note: Schedule is consistent with handbook

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IMPORTANT DATES

NAME OF PARTNERSHIP
DATE OF VISIT

❖ ACTIVITY	WHO	TIME FRAME	ACTUAL DATE
1. Request a visit	PSC and PSC Chair	6 months prior to requested visit	
2. Make logistical arrangements and communicate information to project staff (e.g. hotel arrangements, technology support, airport information, car rental)	*Logistics contact who communicates to agency staff Technology support liaison	As soon as the dates of visit are confirmed	
3. Submit update of self-study and/or questions for visiting team	*PSC Chair and PSC	weeks before the visit	
4. Select/set-up documents and exhibits	*PSC Chair and PSC	4-8 weeks before the visit	
5. Set-up pre-visit conference call This will be initiated by visit team Chair. Agency staff will make arrangements once date and time are confirmed	*Visit Team Chair Agency Staff	7 weeks before visit	
6. Develop draft schedule and send to agency staff for distribution to visit team chair	*PSC Chair and PSC Agency staff to distribute	6 weeks before visit	
7. Pre-visit conference call	Visit Team chair, PSC chair, logistics contact, site technology support person and Agency staff person	3-4 weeks before visit	
8. Firm up schedule Send revised schedule to project staff	*PSC chair Staff to distribute to chair and team	2 weeks before visit	
9. Create visit team packet	*Logistics contact	2 weeks before visit	
10. Set-up workroom for team	*Logistics contact and Technical support person	Day before visit starts or morning of first day	
11. PSC prepare 15-20 minute presentation about self-study	PSC chair and PSC	One week prior to visit	
12. PSC conveys to site participants, expectation of site visitors Team reaffirms their role during visit	PSC Visit Team chair	One week prior to visit First evening of visit	
13. Site will receive written report	*Visit Team chair will send to PSC chair	3-4 weeks following visit	
14. Response to visit and team report Partnership reflection on follow-up	*PSC Chair , PSC and partnership meet	Within one month of receipt of report	
15. Follow-up activity (Report on Impact of the process)	*PSC Chair and PSC will send to Visit Team chair and agency	Within two month of receipt of report	

❖ See *Handbook* for details of each activity.
* Initiator of activity

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The Standard of Excellence in Teacher Preparation

National Council for Accreditation of Teacher Education

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